



Infor System21 Equipment Servicing

Product Guide

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Publication Information

Release: Infor System21 3.2

Publication date: October 22, 2024 (v2.00)

Document code: EQ

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About this guide

The purpose of this document is to describe the functions that can be used within the Equipment Servicing Module.

Intended audience

The guide is intended for any users of the EQ Equipment Servicing business module.

Related documents

You can find the documents on docs.infor.com, as described in "Contacting Infor" on page 31.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a case.

The latest documentation is available from docs.infor.com

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1 Overview

Introduction

Equipment Servicing is designed to operate independently or as an integrated part of other applications.

The package will support multi-[branch](#) operations within each of a number of companies.

[Contract](#) maintenance is supported by [quotations](#), pricing and renewal to the production of maintenance invoices, including In Advance, Arrears or By Instalment.

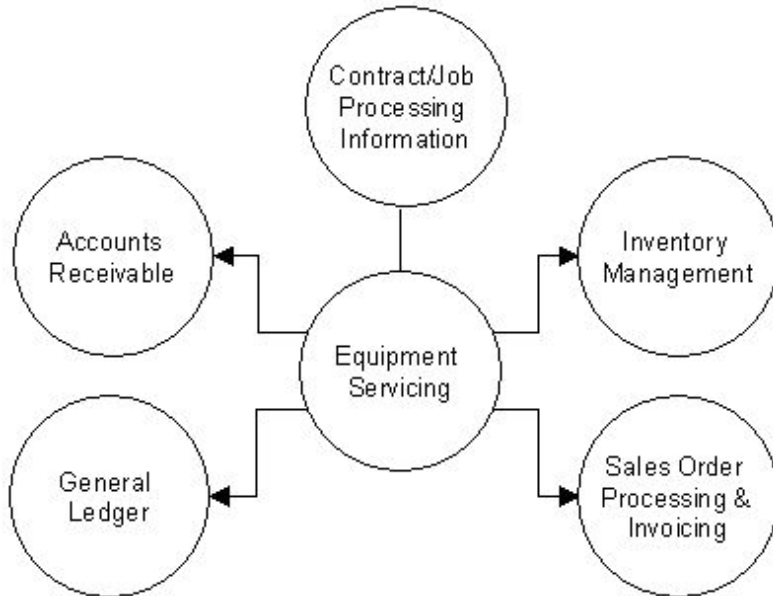
[Job](#) processing is controlled by service [call](#) logging, technician allocation and planned maintenance. [Job](#) escalation facilities are also provided. Full enquiry features enable access to master files, transaction history, [job](#) status, and financial data.

Where System [Manager](#) is installed, security is provided by restricting access to certain functions by operator ID. This means that operators can be prevented from accessing specific functions, or information belonging to certain companies.

Relationship to Other Applications

Equipment Servicing operates under the control of System [Manager](#). The full benefits of the system are gained by integrating it with the following prerequisite applications:

- [Accounts Receivable](#)
- [General Ledger](#)
- Inventory Management
- [Sales Order Processing](#)



You can also optionally integrate it with the following:

- Advanced Financial Integrator ([AFI](#))
- Distribution Requirements Planning
- [World Trade](#)
- Fixed Assets

General Ledger

Detailed [cost](#) and income values are held in the Equipment Servicing system, while a financial summary of [job](#) values is provided in the [General Ledger](#) (GL). It is imperative that the two sets of values are balanced and can be reconciled.

An Equipment Servicing sub-ledger can be set up within the [General Ledger](#) with its own control account for work in progress control, as well as other holding accounts for [costs](#) entered within Equipment Servicing, Inventory Management and [Accounts Payable](#). This is optional.

Each transaction ([cost](#) or income) is posted to a valid [General Ledger](#) account, which must already be set up. Posting masks enable you to target a GL account without having to enter a code on every transaction.

The original [cost](#) and billing references are written to all movements posted to [AFI](#), and are then passed into the transaction match code field on the GL journal line, thereby aiding the reconciliation of suspense accounts in the [General Ledger](#).

Accounts Receivable

Equipment Servicing shares customer detail information with [Accounts Receivable](#). Open items are created and relevant accounts are updated on printing of invoices.

[Costs](#) may be posted automatically when 3-way matching of invoices is used to post to the ledger.

Purchase Management

Purchase Management accumulates the value of outstanding purchase orders, with matching [job](#) numbers, against each [job](#) level. You can use Purchase Management to display the outstanding orders for a [job](#).

Accounts Payable

[Costs](#) attributed to outside sources such as sub-[contractor costs](#), bought out materials and services, can be entered into the Equipment Servicing system via [Accounts Payable](#). This occurs when the invoice is accepted into the [Accounts Payable](#) system by a request for additional information, i.e. [job/sub-job/task](#), plus a breakdown of the type of expense. [Employee expenses](#) can also be entered through [Accounts Payable](#).

Inventory Management

Inventory Management is used for issuing physical stock on an ad hoc basis or for returning unused ordered parts.

Sales Order Processing/Advanced Order Entry

Equipment Servicing can interface with Inventory Management to capture the [cost](#) of inventory items. Equipment Servicing captures the necessary [costs](#) by defining a list of parts needed for a [job](#) detail.

[Sales Order Processing](#) progresses the list of parts, defined as an order, from entry through to despatch. This facilitates the production of acknowledgements, pick notes and 'clean' despatch notes for the [parts list](#). Because the invoices are produced within Equipment Servicing, confirmation of despatch prevents the creation of an invoice; instead the inventory [costs](#) are posted to Equipment Servicing. Each [job](#) detail (i.e. any [job/sub-job/task](#) number) may be assigned to one sales order.

Fixed Assets

The Equipment Servicing interface to Fixed Assets enables fixed assets to be held against more than one [job](#) detail. Where projects using Equipment Servicing involve the construction or assembly of fixed assets, the transfer of the asset from Equipment Servicing to Fixed Assets can be completed via a transfer facility within Equipment Servicing.

Tax Engine

When operating in Brazil and India, the Infor tax engine should be used to calculate multiple levels of tax. Refer to www.docs.infor.com for integration details

Two Core Principles

Job Hierarchy

To provide complete flexibility for diverse types of projects and reporting requirements, the definition of a [job](#) is divided into three levels:

- Prime [job](#) - 7 numeric characters long
- [Sub-job](#) - 3 characters long
- [Task](#) - 3 digits long

The prime [job line](#), which has a blank [sub-job](#) and a zero [task](#), is mandatory, but further [job lines](#) with entries for [sub-job](#) and [tasks](#) are optional depending on the complexity of the project and the amount of detail required for control and analysis. The prime [job line](#) cannot have labour hours, parts or subcontract activities attached to it.

Roll-Up

Costs - [Cost](#) transactions are entered against a [job](#) by specifying the prime [job](#), the [sub-job](#) and [task](#) (if required), plus the [expense type](#). [Costs](#) and income are rolled up (i.e. transferred) to the next level. The system will hold the this level [costs](#) and income, as well as the rolled-up [costs](#), so that prime [job](#) and [sub-jobs](#) show values of work carried out both at that level and at all subordinate levels.

Budgets - The system attaches [budgeted costs](#) at every level, with a breakdown of year and period. A [budget](#) type identifies whether the values are associated with [budget](#) or forecast [costs](#).

[Budgets](#) can be set at any [job](#) level. The application will automatically roll up [budgets](#) from a lower level through the [job](#) hierarchy. For greater flexibility, it is possible to record a rolled-up [budget](#) at a higher level and then protect it from being overwritten during the automatic roll-up.

[Budgets](#) can also be produced against an [expense type](#) at each [job](#) level, with six [budget](#) levels created within any one [budget](#) code:

- Prime [job](#) level
- [Sub-job](#) level
- [Task](#) level
- [Job](#)/expenses level
- [Sub-job](#)/expenses level
- [Task](#)/expenses level

The system defaults to a user-defined [budget](#) code. However, further [budgets](#) or forecasts can be created for any one [job](#).

Application Configuration

As is the case with all applications, Equipment Servicing can be operated for a number of companies, the characteristics of each being maintained in a control file. The application is controlled by setting up data for the [company](#) and then for each [branch](#) within the [company](#). This would normally be done after the [Accounts Receivable](#), Inventory Management and [Sales Order Processing](#) companies have been created.

[Accounts Receivable](#), Inventory, [Sales Order Processing](#) and Equipment Servicing applications will all use the same [company](#) codes. [Branches](#) may be added after the application has been started.

Certain data and policies are defined at the [company](#) level. These include:

- Document reference numbers: invoice, credit note, [contract](#), [job](#)
- [General Ledger](#) accounts

- Default labour price list
- Default [scheduled visit profile](#)
- Working day start/finish times
- Hours entry only, for [Call](#) Reporting

Additionally, the details of service and [accounting periods](#) are defined at [company](#) level. Up to 99 [service periods](#) per year are allowed, and are used mainly for the scheduling of planned maintenance [visits](#). Each day of the year may be defined as a working or non-working day, to enable calculation of target response date/time for [jobs](#).

Up to 99 [accounting periods](#) per year are allowed and these should be consistent with those specified in the ledgers. The number of days in the [accounting periods](#) is used to enable the apportionment of deferred revenue from [contracts](#) invoiced in advance.

Once the control parameters for a [company](#) have been defined, at least one [branch](#) will be defined. A [branch](#) is a physical or logical [location](#) that has responsibility for servicing specific customer [sites](#).

Certain data and policies are defined at the [branch](#) level. These include:

- [Branch](#) name and address
- Printer output queue for [job](#) audit log
- [Job](#) escalation parameters: escalation time fence
- Escalation reporting interval
- Users to be alerted at each escalation level
- Default labour price list
- Default labour [cost](#) list
- Default inventory stockrooms for service parts and exchange items

Each user must be authorised to access at least one [branch](#) within a [company](#), but may be authorised to several or all [branches](#) if required. This authorisation by [branch](#) will restrict the data to which a user has access.

Application Reference Data

Equipment Servicing uses a number of reference files that hold data which rarely changes, as follows:

- Standard codes and descriptions
- Customers
- [Divisions](#), [model](#) groups, [model](#) sub-groups and [models](#)
- [Installations](#)
- [Contract types](#)
- [Job](#) categories
- Labour rate price lists

- Service territories, teams and [field service groups](#)
- Technicians
- [Contract](#) rates
- [Scheduled visit profiles](#)

Standard Codes and Descriptions

A Descriptions or Codes/Parameters file enables codes to be set up with standard descriptions. This provides for validation at the time of data entry and also the display of descriptions on both windows and reports. In some specific instances, a parameter or number is also stored, as for example in the case of value added tax percentages.

Certain standard codes and parameters must be present for the successful operation of Equipment Servicing and these are supplied with the system. Examples of code types and values that might be set up are as follows:

Code Type	Type Description	Code Value	Code Description
FLTC	Fault Code	OVH	Overheating
		ELE	Electrical Fault
EGRD	Technician Grade	GR1	Grade 1
		GR2	Grade 2

Customers

Equipment Servicing shares a common customer database with [Accounts Receivable](#) and [Sales Order Processing](#), with maintenance routines in each application reflecting its specific requirements. For example, [Accounts Receivable](#) controls credit limits and payment [terms](#), [Sales Order Processing](#) controls stock allocation, pricing of sold items and Equipment Servicing controls pricing of service transactions and [invoice consolidation levels](#).

The structure of the customer information can be manipulated to match the structure of the customer's organisation. On the one hand there may be a simple single account, on the other a statement account with many invoice accounts, each with many different delivery or [installation](#) accounts.

Statement Account

This is shared with [Accounts Receivable](#) and is normally created and maintained by it. The data includes credit details, [Accounts Receivable](#) parameters and statistical codes.

Invoice Account

Invoices may be sent to an invoice only address.

Delivery or [Installation](#) Account

Each account may have many delivery or [installation addresses](#). These can be defined within [Sales Order Processing](#) and/or Equipment Servicing, by adding a three-character address code suffix to the account code.

Additional Information

Each account address at which equipment is to be serviced must have additional information set up, which is used solely by Equipment Servicing. The information includes the invoice destination address, account type for control on invoice production, [invoice consolidation level](#) (account, address code or [contract/job](#)), internal customer indicator, service region, mileage charge method and rates and price lists, which may be used for service parts and labour.

Identification of a customer can be made either by entering the account code and address code, or by using the powerful name and address search routines that are available in the system.

Models

Each piece of equipment defined to Equipment Servicing is identified by its [model](#) code and, normally, its [serial number](#). Standard [model](#) codes/numbers are used to describe the different types/configurations of equipment that can be installed. Each [model](#) code is defined to a [model](#) hierarchy, linked firstly to a [model](#) sub-group, which in turn is linked to a [model](#) group, which in turn is linked to a [division](#) code.

[Models](#) may be classified into [model](#) types such as equipment, peripherals, service exchange items, components. Each [model](#) type must be specified against the appropriate [job](#) categories. For instance, the equipment [model](#) types can be attached to all [job](#) categories but service exchange items should only go on service exchange [job](#) categories.

Each [model](#) code may have one or more Inventory item codes attached to it. This code is used to translate between Inventory item numbers and Equipment Servicing [model](#) codes in the [Sales Order Processing](#)/Equipment Servicing interface and the Credit Assessment module, where refurbished [models](#) are received into an Inventory stockroom.

[Models](#) may also be classified as metered [models](#) or non-metered [models](#). Metered [models](#) can have warranty determined by both time and units used and may be attached to metered [contracts](#), where billing is based on units used.

[Contract](#) rates for different types of [service contract](#) can be held at [division](#), [model](#) group, [model](#) sub-group or [model](#) code level; technicians can be assigned to perform work only on specific [divisions](#), [model](#) groups, [model](#) sub-groups or [models](#) within a service territory.

The labour rates to be charged for service work can be determined by the [model](#) on which the work is performed, since each [model](#) code holds a pointer to its appropriate labour price list.

Installations

An [installation](#) within Equipment Servicing can be defined as a customer address at which equipment or systems are installed.

The customer address is identified by an account code and address code and can have many items of equipment or systems installed. This configuration of equipment or systems at a customer [location](#) constitutes an [installation](#) record. Records should be set up for all [installations](#), irrespective of whether they are covered by [service contracts](#).

Each piece of equipment at an [installation](#) is identified by the unique combination of its [model](#) number and [serial number](#). If [serial numbers](#) are not known, the [model](#) number and [model](#) quantity can be used.

The data held for each piece of equipment at an [installation](#) includes details of age, dates of delivery and [installation](#), warranty period and warranty units, [location](#)/department, override owning customers and their addresses.

It is possible to maintain a complex configuration of [model/serial numbers](#) against a particular master piece of equipment. Up to 3 levels of equipment can be configured against the master machine. If a [call](#) is taken against a [model/serial number](#) that is in an active configuration, the configuration is displayed to the user to allow confirmation that the piece of equipment is still attached to this configuration. This will aid the technician in locating the unit. In addition, it is the [contract](#) of the master machine that will be written to the [job](#) and control the billing of the [job](#).

Once an [installation](#) record is defined, it can be added to a [service contract](#) to control its billing in the [contract](#) module and chargeability in the [job](#) module.

Technicians

Each technician who will carry out service/repair work is defined in the Technician Master file. Details include name and address, radio page number, team code, grade, hourly [cost](#) rate, service region, time allocation code, mileage claim rate and stockroom codes (both supply and using stockrooms), together with any skills matrix elements.

The stockroom codes provide the link to Inventory Management and must be defined therein. The using stockroom represents a discrete area within a [company](#) where stock is recorded and controlled separately from other [company](#) stocks. In the case of service technicians, the stockroom could be the specific van or car of the technician himself, or a common store or depot from which spare parts are drawn.

Some technicians will be designated as third party technicians and these will have an associated supplier number. The third party technicians and suppliers are used when creating subcontract purchase transactions. Only suppliers with a matching technician will be available for Equipment Servicing purchase order creation.

Service Territories and Technician Assignment

Equipment Servicing facilitates the automatic assignment of technician teams to service [jobs](#), provided certain details have been defined:

- The customer records must hold the geographic area or postcode of the customer address.
- The geographic area covered by the [company](#) must be divided into service territories; each territory will be defined by a list of full or partial geocodes/postcodes.
- The technician teams who cover each territory must be specified.
- The [field service group](#) for the team must be defined, to show which product [divisions](#), [model](#) groups, [model](#) sub-groups and [models](#) the team will service. The [field service group](#) record contains a skills matrix to define these limits.

The system can map the customer's address to a service territory and allocate work to the team of technicians designated to operate in that territory.

The allocation of an individual technician within the team to a specific [job](#) can be handled automatically or manually. Further specialisation is used in [job](#) selection according to the technician's skill level, i.e. a technician can be assigned to service specific [model](#) groups (and optionally sub-groups) and/or to perform work of a specific type (i.e. [job category](#)), and/or to perform work on equipment belonging to a specific [division](#).

Contract Types

[Contract types](#) are used to define the different types of [service contract](#) offered by the [company](#) to its customers. Along with its description, each [contract type](#) record holds the normal duration of the [contract](#), guaranteed response hours, invoice schedule (in advance, in arrears, or on completion of each scheduled maintenance [visit](#)), and whether a [quotation](#) or [contract](#) is generated at renewal time.

Billing parameters, which may be applied to the [contract type](#), are also selected (i.e. to indicate if service charges, rental charges or various meterage conditions will apply).

All [contracts](#) created in the system will have a user-defined [contract type](#) code. The system will default a [contract type](#) code of *NO for work on equipment not covered by a [service contract](#).

The parameters set up for the [contract type](#) will act as defaults for the [contract](#), but can be changed if required.

Job Categories

[Job category](#) codes are used to describe the different types of work to be performed. A number of categories can be defined as system defaults for breakdowns, warranty and repeat [calls](#) etc.

[Job](#) categories fall into four main groups and will be processed by the Equipment Servicing application differently.

The four main groups are:

- Field service categories, where the technician goes to the equipment
- Workshop categories, where the equipment moves to the workshop

Service exchange categories, where components are returned to the workshop for refurbishment and a replacement component sent to the customer

Non-[job](#) categories for non-equipment-related activities such as holiday, meetings, sickness etc.

[Job](#) categories control the fundamental flow of [jobs](#) through the Equipment Servicing application. Settings on the [job category](#) can determine whether certain functions are mandatory; for example, [job](#) completion and pending invoice maintenance menu functions can both be made optional for certain types of [jobs](#).

Additionally, a table of valid [job category](#) codes for each [contract type](#) must be defined. This table is used to specify whether the customer should be charged for travel and labour hours (both fixed and hourly charges), for up to four parts groups and for miscellaneous charges, when work of a certain [job category](#) is carried out on equipment covered by the specific [contract type](#).

Price Lists

Two types of price list are used by Equipment Servicing: one for labour rates and one for parts.

Labour rate price lists define the hourly labour rates to be charged to customers.

Labour/travel time can be charged in one of two ways, depending on a [company](#) profile setting: it can be charged by rate or by grade.

In both cases, there is a hierarchy of possible labour price lists that can be used. Equipment Servicing uses the hierarchy to identify the list number to be used and then accesses the rate or grades price file as appropriate.

The labour/travel price list can be stored in the following hierarchy and the system will find and use the first list that it can.

- 1 Contract Conditions
- 2 Contract Equipment
- 3 Contract Header
- 4 Job Category/Customer
- 5 Job Category
- 6 Customer
- 7 Model
- 8 Model Sub-group
- 9 Model Group
- 10 Model Division

11 Branch

12 Company Profile

As the price lists and prices are entered in a currency, the labour price list retrieval is performed with the currency of the billing customer of the [job](#), which may be different from that of the customer held against the prime [job](#).

If rate-based pricing is in effect, the price list will be used to access the lists set up in the Maintain Labour Price List [task](#). These price lists store separate prices for travel time, service labour and workshop labour. Therefore, the price selected will be dependent on the [job category](#); i.e. it will use the service price for [job](#) categories defined as field service and the workshop price for the others. The travel rate will be used for any travel time entered.

If grade-based pricing is in effect, the price list will be used to access the lists set up in the Maintain [Cost/Price List task](#). These lists store a series of prices per grade and a default price for the list. Therefore the technician's grade will be used to access the list and if a price is found, it will be used. If a price is not found for the specific technician grade, the default price will be used for all transactions (i.e. the same price for all [jobs](#) irrespective of [job category](#)).

Parts price lists and discount lists define the prices and discounts to be applied when charging for spare parts fitted or used by a technician. These lists, which also carry effectivity dates, are maintained in [Sales Order Processing](#), but are stored in the following hierarchy and the system will find and use the first list that it can.

- 1 From OE - If the flag is set in the EQ company profile, the parts price list from the OE customer record
- 2 Contract Conditions
- 3 Contract Equipment
- 4 Contract Header
- 5 Customer
- 6 Model
- 7 Model Sub-group
- 8 Model Group
- 9 Model Division
- 10 Company Profile

Contract Rates

[Contract](#) rates are defined for each [contract type](#) at [model](#) group, [model](#) sub-group or individual [model](#) code level.

[Contract](#) rates specify the charge per scheduled maintenance [visit](#) and/or a fixed charge for each piece of equipment covered by the [contract type](#). [Contract](#) rates carry effectivity dates to control the application of new rates, and are used by the [contract](#) pricing routines in Equipment Servicing.

[Contract](#) rates can only be used when the system has been defined for [term](#) processing; they cannot be used for monthly processing.

Scheduled Visit Profiles

[Scheduled visit profiles](#) are used to define standard schedules of planned maintenance/service [visits](#) to equipment under [contract](#). The schedules are defined in [terms](#) of the number, type and frequency of [visits](#).

A [visit](#) profile can be associated with a [contract](#), [model](#) or [model](#) group, and enables the automatic generation of the service [visit](#) schedule for any piece of equipment added to a [service contract](#).

The scheduled [visits](#) can be converted into a [job](#) by the Load Planned Maintenance [Jobs task](#), selecting by [service period](#). The conversion process will [call](#) the [job](#) template generator so that a fully structured [job](#) is created.

The planned maintenance [jobs](#) are progressed through the Work Control [task](#) in the same manner as service [jobs](#).

However, during [job](#) pricing, an additional access is made to the scheduled [visit](#) to retrieve a [special price](#), if one exists.

Contract Processing

Equipment Servicing provides flexible and comprehensive facilities for [contract](#) management, as follows:

- Maintenance
- Pricing and invoicing
- Renewal
- [Quotations](#)
- Credits

Contract Maintenance

[Service contracts](#) are identified by a unique combination of [contract](#) number, type and start date. Each [contract](#) is owned by one service account code but can relate to equipment at one or more [locations](#) of the owning customer account code or it may relate to equipment for any other customer account code. The [contract](#) may cover one or more pieces of equipment installed at these [locations](#).

Therefore, a single [contract](#) may be [multi-currency](#) and incorporate multiple tax regimes.

When a new [contract](#) is entered on to the system, the [contract](#) number, type, start date, customer account code and address code are specified. [Contract](#) header and equipment records are created.

The [contract](#) header record includes the [contract](#) duration and end date, the order reference and date and the invoice destination. The service parameters include the response hours, the [scheduled visit profile](#), whether it allows service cover while the [contract](#) is pending and the rates to be applied. The billing parameters include the [invoice term](#), the invoicing frequency and whether charges are in advance or in arrears. The service conditions provide for setting up service and rental charges at [contract](#) header level; the service charges override the [contract](#) rates set by [model](#) group, [model](#) sub-group or [model](#) and the service conditions can be overridden at equipment and peripheral levels.

Once the header has been validated and updated, the [contract](#) equipment may be selected. A [contract](#) must have at least one piece of equipment on it. The system will provide a list of all the equipment defined for [locations](#) of the account code entered. Those items to be placed on the new [contract](#) can be selected. Equipment can only be placed on a [contract](#) if it has been previously specified as resident at a [location](#) of the account entered. Service conditions at equipment and peripheral levels can be added to the [contract](#). For each item on a [contract](#), a schedule of planned service [visits](#), by [service period](#), for the duration of the [contract](#), can be created. These [visits](#) can hold a specific charge, applicable to the [visit](#), which is inclusive of parts, labour, travel etc. The [visits](#) can be created automatically by the system using the service [visit](#) profile associated with the [contract](#) header, [model](#), or [model](#) group or entered manually, if required.

Contract Pricing and Invoicing

[Contracts](#) which are invoiced in advance or in arrears are priced and invoiced as follows:

Service Pricing

A [contract](#) is priced for a defined period of time ([invoice term](#)) which may be the same as the [contract](#) duration itself, or may be less. The charge for an [invoice term](#) can in turn be split into instalments for invoicing purposes; for example a one-year [term](#) can be invoiced in quarterly instalments. Additionally, the system will allocate pro rata the charge for equipment added to a [contract](#) part way through its [invoice term](#).

Rental Pricing

A rental charge may be made for equipment on [contract](#) (if rental is defined on the [contract type](#)). The charge may be applied on the [contract](#) header, in which case it will be used as the default price for each item added to the [contract](#), or may be maintained on the [contract](#) equipment line. The charge entered will be per month if monthly processing has been selected in the Parameters file or per [term](#) if [term](#) processing has been selected.

Meterage Pricing

The following meterage charges may be applied (if selected on the [contract type](#)). Meterage charges can only be used with monthly processing. If a meterage [contract type](#) is selected, only metered equipment can be added to the [contract](#).

- A minimum volume can be defined on the [contract](#) header or equipment line. The minimum volume will be multiplied by the price per copy, to reach a minimum monthly charge, which may be invoiced in single or multiple months.
- A minimum charge can be defined on the [contract](#) header or equipment line, which will be the minimum monthly charge; this may be invoiced in single or multiple months.
- Up to five copy charge bands, for each of two meters, can be defined for each [contract](#) equipment line.
- Interim pricing allows for charges to be made according to a meter estimate, or actual reading returned by the user, based on the minimum units already charged for (or actual units used if no minimum has been entered). The frequency of interim pricing is defined in the [contract](#) billing cycle on the [contract](#) header.
- Reconciliation pricing allows for charges to be made according to an actual meter reading and allows for additional meterage charges to be applied, or credits given for overcharges. The reconciliation [term](#) must be a multiple of the interim period and is defined in the [contract](#) billing cycle on the [contract](#) header.

Invoicing

[Contract](#) pricing creates records on an invoice's pending file. A second [task](#), Generate and Print [Contract](#) Invoices, generates invoice header and line records. At this stage, invoice consolidation (the grouping of invoice pending lines into invoices) takes place as specified on the customer additional details records, i.e. by account, account/[location](#) or [contract](#). VAT is calculated according to the parameters set on the customer account record. The invoice documents are then printed.

Invoice generation posts the relevant transactions to the Sales Ledger and [General Ledger](#). Where advance invoicing is performed, the revenue (i.e. income) value of the invoice is deferred in the [General Ledger](#), by generating additional postings which transfer period revenue values from a deferred income account into a sales account each period.

Contract Renewal

The Renew [Contract task](#) can be run at any time and prompts for a date representing the expiry date limit of [contracts](#) for renewal. The system reads through all active [contracts](#) and determines which ones to renew, by comparing the [contract](#) end date of eligible [contracts](#) with the entered date. If the [contract](#) end date is less than or equal to the entered date, renewal is performed.

In order to renew a [contract](#), the equipment on the [contract](#) must still be eligible for the [contract type](#); i.e. the [contract](#) charge rates must be in effect.

A new set of [contract](#) records will be generated with either the same [contract](#) number or a new, system-assigned [contract](#) number depending on an indicator in the [company](#) profile. The [contract](#) start date for the new [contract](#) will be the day after the existing [contract](#) end date. Other [contract](#) details are copied to the new [contract](#).

The status of new [contracts](#) will be set as either Pending Start Date or [Quotation](#), depending on the [Quotation](#) Required at [Contract](#) Renewal flag on the [contract type](#) record. The user can, if required, amend the [contract](#) details generated (through [contract](#) maintenance procedures) before [quotations](#) or invoices are generated.

Contract Quotations

[Quotations](#) are created in the same way as [contracts](#), but have a special status of [Quotation](#). They can only be created for [contracts](#) with service and rental charges; [visit](#) and meterage [contracts](#) cannot have system-generated [quotations](#).

[Contract quotations](#) can be produced, to show account/[site](#) details, [contract](#) number, type, start date, duration, customer order number, equipment covered, number of scheduled maintenance [visits](#) and price. The [quotation](#) price is calculated in the same way as the [contract](#) invoice price.

[Quotations](#) can be converted to [contracts](#), by using the [contract](#) maintenance facility to change the status from [Quotation](#) to Pending [Contract](#). A facility is also provided for generating [quotations](#) from existing [contracts](#). This can be used, for example, if a customer requires a [quotation](#) for a different type of [contract](#), covering the same equipment as his existing [contract](#).

Contract Credits

Credits can be processed at any time, to refund part, or all, of a [contract](#) invoice, and to cancel any pending invoice records. Only [contracts](#) where the Equipment Removed On date or the [Contract](#) Header [Termination](#) date is earlier than any previously invoiced instalment date are eligible for credit processing.

The [contract](#), or the invoice, or the pending [invoice period](#) from/to is selected. The selected record(s) may be amended to affect the operative date and value(s) involved. The selected record may be discarded, a full or partial credit may be given, or the original charge may be credited and a different amount re-invoiced.

The resultant invoices and credit notes are produced when the Generate and Print [Contract](#) Invoices [task](#) is next run. Any cancelled pending invoice records are removed from the work file at the same time.

Job Processing

An important function of any service organisation is to complete, in an efficient and timely manner, both ad hoc customer service requests and planned maintenance work, according to the [contractual terms](#) agreed.

Both types of [jobs](#) can be controlled either as breakdown [jobs](#) or as planned maintenance [jobs](#).

On completion of [jobs](#), any chargeable work should be invoiced promptly in order to optimise cash flow.

Equipment Servicing provides the following facilities to enable these objectives to be met:

- [Job](#) templates
- Planned maintenance [job](#) generation

- [Quotations](#)
- [Call](#) logging
- Equipment book-in
- Service exchange
- Technician work assignment
- Work control
- Technician [job](#) reporting
- [Job](#) completion
- Pending invoice maintenance
- [Job](#) invoicing
- [Job](#) escalation
- Remote communications links to and from technicians

Job Templates

Some categories of [job](#) are very complex and may have many [sub-job](#) and [task](#) levels associated with them. In turn, each level of the [job](#) could have labour, parts demand, expenses, subcontractor [tasks](#) and work instructions.

The full rebuild and planned maintenance [jobs](#) are two possible examples of [job](#) categories that may have complex [job](#) structures associated with them.

To ease the maintenance load during [call](#) creation, a template structure maintenance function has been created that will allow a user to create the 'standard' [job](#) structure in advance for a particular type of equipment and type of [job](#), associating with it all the elements normally required.

The template will be used by all the [call](#) creation methods ([call](#) logging, planned maintenance [job](#) generation and [Sales Order Processing](#) interface [job](#) generation) to generate a 'real' [job](#) structure from the template structure. [Quotations](#) are also generated using the same template generator and will have a structure matching that of the 'real' [job](#).

All elements in the [job](#) structure, whether in [job](#) or [quotation](#) mode, can then be maintained if required.

Planned Maintenance Job Generation

This is a process that is run as required. The Load Planned Maintenance [Jobs task](#) creates a service [job](#) for each [installation](#) that has a planned maintenance [visit](#) scheduled for periods falling within a user-specified range. The function allows the schedule to be created for up to six periods in advance of the current period. The service schedule details, held for equipment covered by [contract](#), provide the base data for processing.

The process will attempt to assign a technician team to each service [job](#), by comparing the customer's geographic code with the territory definitions and the [model](#) type requiring service with the [field service group](#) that covers the [division](#), [model](#) group, [model](#) sub-group and [model](#). If a specific technician was entered against the equipment on the [installation](#) record, this technician will always be assigned (if this method of selection is defined in the Maintain Codes/Parameters [task](#)).

If there is more than one piece of equipment at an [installation address](#) on the same [contract](#) requiring a service [visit](#) in the same period, this procedure will normally generate only one [job](#) covering all the equipment. However, an option can be set in the [company](#) profile to generate an individual [job](#) for each piece of equipment.

Quotations

It is possible to build up [quotations](#) using an identical hierarchical structure to [jobs](#), with a header, details, [sub-jobs](#), and [tasks](#). You can enter transactions at any level.

You do not make any postings to [General Ledger](#) from [quotations](#). You can add estimated [costs](#) at any level in the hierarchy, and you can build up part lists and user-defined transactions. You can also override prices and make global mark-up changes.

The Equipment Servicing [quotation](#) feature works as follows:

Create a [quotation](#) by logging a [job](#) and flagging it as a [quotation](#).

The template generator will run to create [sub-jobs](#) and [tasks](#) automatically, along with their associated parts and labour transactions.

Within the Maintain Quote [task](#), for each [quotation](#) detail (any header, [sub-job](#) or [task](#) number), add a number of transactions, with a reference number and a description.

You can revise any [quotation](#). The software defaults to the latest revision, but you can still maintain other revisions.

The [quotation](#) can be converted to a live [job](#), where the estimated [costs](#) become the [job budgets](#).

Note: *If the item is defined as FIFO, any [costs](#) retrieved at [quotation](#) creation time may be misleading, particularly if the price is determined by applying a mark up %.*

Job Processing Cycle

[Job](#) processing has many modules that can be used to control the flow of [jobs](#) through the Equipment Servicing application.

- Generally the modules will be used in the following sequence:
- [Call](#) logging
- Equipment book-in (workshop [jobs](#) only)

- Work control
- [Timesheet](#) entry and reconciliation
- [Job](#) completion
- Pending invoice maintenance
- Generate and print [job](#) invoices
- [Job](#) history enquiries

Whether [job](#) completion and pending invoice maintenance are mandatory steps in this [job](#) processing cycle is determined by flags in the [Job Category](#) file.

[Job](#) completion allows a review of all transactions before they are released to the invoicing module. The transactions themselves can be modified by this process.

Pending invoice maintenance allows a review of released invoice transactions to allow manipulation but this will not modify the original transactions.

Each module is discussed in more detail below.

Call Logging

This facility enables unscheduled/breakdown [calls](#) from customers to be recorded and corresponding service [jobs](#) or [quotations](#) to be generated, for subsequent allocation to technicians. It also enables the details of existing outstanding [jobs](#) to be amended.

The [job](#) categories that can be created using this function are:

- Pre-booked workshop [jobs](#) (warranty and non-warranty)
- Field service [jobs](#) (warranty and non-warranty)
- Service exchange [jobs](#)

Pre-booked Workshop Jobs

This allows the booking of a piece of equipment into the workshop where the equipment has not yet arrived in the workshop. This type of [job](#) will have a target receipt date and time calculated to help indicate when equipment is due into the workshop. The collection method indicates the way in which the equipment is to be delivered to the workshop: either by the customer or by the workshop arranging for pick up. Depending on the collection method, the [job](#) will be given a different status: 01 (Customer to Deliver) or 02 (Workshop to Pick Up).

The different statuses will allow the workshop to monitor the pre-book equipment through pro-actively the Work Control [task](#).

Field Service Jobs

This allows the creation of a field service [job](#) to fix a piece of equipment at the customer [site](#). The target date and time calculated for these [jobs](#) is the target start date and time. If the FSG/Territory/Team function has been set up, a team and technician can be automatically assigned.

Service Exchange Jobs

Service exchange [jobs](#) are always workshop [jobs](#) and assume a certain structure of template. The purpose of these [jobs](#) is to control the immediate supply and invoicing of a replacement unit and to create a pre-book [job](#) for the same type of unit in anticipation of its return from the customer. Once the unit has been returned, it can be assessed. It is either rejected, in which case the [job](#) is closed, or it is accepted for refurbishment and a credit note is issued to the customer.

The [job category](#) entered on the prompt window will also determine the route through the [call](#) logging process through a mode indicator on the [job category](#).

Single equipment mode, where the user wishes to select a piece of equipment from an existing list:

- [Job](#) creation window
- List of outstanding [jobs](#) for selection
- List of equipment
- [Job](#) details
- Template selection
- [Job](#) structure
- Return to [job](#) creation window

Multiple equipment mode, where the user wishes to enter one or more [model](#) and [serial numbers](#) in the same session (for example, if a pallet of units arrived at the workshop from the same customer):

- [Job](#) creation window
- List of outstanding [jobs](#) for selection
- [Job](#) header entry
- Template selection
- [Job](#) structure
- Return to [job](#) creation window

Addition of a New Job

The logging of a new [job](#) requires entry of the [job category](#) and customer account code (which can be found using alpha search data) or the [job category](#) and details of the [model](#) or [model/serial](#). Any of these enables access to the customer [installation](#) record, which holds the details of the equipment at the customer [site](#). A new [job](#) can only be logged if an [installation](#) record exists for the customer address which is requesting service. A facility to create [installation](#) details for non-account customers is provided at this point.

If the customer is on credit hold/stop, a warning message is displayed and the [call](#) status is set to Credit Hold, but the [job](#) may still be entered.

If an account code and address code have been entered and the [job category](#) indicates single equipment mode, a list of the equipment at the [installation](#) is displayed. Each item to be included on the new [job](#) can then be selected from the displayed list. If a specific [model](#) and [serial number](#) have been entered, the [job](#) details for the item are prompted for immediately.

If the customer has a number of items of equipment on [site](#) and cannot identify which of them requires the service, the [job](#) can be logged against any available machine line. When the technician completes the [job](#) and reports on it, the true [model/serial number](#) must then be identified to the system.

The system will check for previous [calls](#) (for qualifying [job](#) categories), to determine if this is considered to be a repeat [call](#): this compares the number of days and/or meter units which have elapsed since the previous [call](#) with the values defined in the Volume Segment file for the [model](#). The system allocates a [job](#) number. The account name and address is displayed and may be amended just for this [job](#). [Job line](#) details are displayed, showing the [contract/warranty](#) cover. Response hours are calculated by reference to the special [serial numbers](#) file, the [contract](#) line, the [contract](#) header or the [contract type](#) (possibly reduced by the 3-D Matrix percentages). A target start date and time is set by adding the retrieved hours to the date and time at which the [call](#) is logged. The date and time at which the [call](#) is logged may be altered while the [call](#) is in Addition mode, to allow for [calls](#) taken out of hours (e.g. by overnight answering service).

A history enquiry, showing details of previous [jobs](#) on the piece of equipment, is displayed if the [call](#) is a repeat, or can be accessed by a function. A customer order number may be entered. This is essential if it is requested on the customer additional details record and any elements of the [call](#) are chargeable.

The customer contact name and the fault code and description for the item of equipment to be serviced or repaired under the new [job](#) number are entered. The response hours can be altered if required. This will cause a re-calculation the target response date and time for the [job](#), which can then be monitored by the escalation procedure. Alternatively, if the customer requires a technician to [visit](#) at a specific date and time, an appointment date and time can be entered. At this stage, a technician can be assigned to the [job](#), by displaying a selection of the technicians in the team and their skills.

Equipment Book-in

This is a function specifically used to book equipment into a workshop. It cannot be used to create field service [jobs](#).

If an unexpected piece of equipment arrives at the workshop, a new [job](#) can be created for it in exactly the same way as via the [call](#) logging function.

However, previously created pre-book [jobs](#) can be booked in either by [model/serial number](#), customer order number or [job](#) number. This will then display the [job](#) details window to allow confirmation of the technician assigned, customer contact, fault code and target date and time. These can be amended as required.

Amendment to an Existing Job

During the [call](#) logging or equipment book-in process, the user has access to existing service [job](#) records through various routes: by entry of customer account code/address code, by entry of [serial number](#), by entry of [model/serial number](#), or by entry of customer order number.

A list of all current [jobs](#) on the system for the [installation](#) is displayed, including both scheduled service and unscheduled/breakdown [jobs](#). On selection of the [job](#) number, the details of [job category](#), technician assigned, customer contact and fault code are displayed and can be amended as required.

Work Control

The work control function allows management of previously created [jobs](#) through to completion.

A [job](#) is progressed through the system by means of the [status code](#) on the [job line](#).

Work control allows you to select [jobs](#) of different statuses in conjunction with other selection fields. Therefore the user can select all [jobs](#) of status 01 (Customer to Send for a Particular [Model](#) Number) or all [jobs](#) of status 06 (Parts to be Ordered) for a particular [job category](#). There are many combinations possible to allow selection of [jobs](#) to be progressed to the next stage.

Work control functions have two levels of authority control on them. To manipulate a [job line](#), the user must be authorised to the team assigned to the [job](#). In addition, there is a user group/work control function where the user is assigned to a user group at [branch](#) level and then can only perform the work control functions authorised to the user group. Therefore a user in [branch](#) A may be able to cancel [jobs](#) but the same user in [branch](#) B may not be able to.

One of the important functions that can be carried out from work control is technician work allocation. This can be carried out by running the automatic [call](#) allocation program, or manually using the Work Control [task](#).

If automatic [call](#) allocation is required, the program is initiated by selecting the Work Control [task](#) from the Service Operations menu. In addition, the Equipment Servicing subsystem must be running. If the subsystem needs to be started, use the Start/Stop Subsystems [task](#) within the Generic Systems application.

Automatic [call](#) allocation is a sleeper [job](#), which will automatically schedule technicians within a team to the [jobs](#) which have been assigned to the team in [job](#) logging. Assignment takes place on the basis of finding an available technician, based on his current workload and skill profile, who can achieve an estimated time of arrival that is equal to or earlier than the target date and time for the [call](#). If the selection criteria cannot be met, an error message is displayed for the [call](#), and a non-assignment reason code is entered on the [Call](#) Detail window.

[Calls](#) can be scheduled manually, in which case the same criteria and checks for technician selection are applied.

The Work Control [task](#) allows outstanding [jobs](#) to be despatched to service technicians who phone or [call](#) in to request work. It also enables entry of status updates from technicians on their current [jobs](#), to indicate for example, that parts are awaited or the work is complete.

A list of [jobs](#) assigned to a specific technician or team of technicians or a list of all [jobs](#) for the [branch](#) can be displayed. Further selection parameters enable either planned [jobs](#) or unscheduled ([call out](#)) [jobs](#) and [jobs](#) of certain status to be extracted.

[Jobs](#) for a team can be displayed graphically: colour blocks represent each [job](#) and the colour denotes the urgency of the [job](#). Unscheduled [jobs](#) for the team are displayed in the lower part of the window; scheduled [jobs](#) are shown under each technician in the upper part of the window. [Jobs](#) can be moved with the cursor and selection of a function. [Job line](#) details can be displayed, for team and technician work queues, by positioning the cursor on any [job](#) and selecting Enter.

Job Structure Maintenance

[Job](#) structure maintenance is [called](#) from within the Work Control [task](#). This function allows the complex [job](#) structure associated with a [job](#) to be maintained using three views of the same structure details. The initial [job](#) structure will have been created by the [call](#) creation function from a [job](#) template, if one exists.

[Job Structure View](#)

This details each [job line](#) associated with the [job](#), and shows its current status, labour hours, [Sales Order Processing](#) order flag status (if this is a parts [job line](#)) or Purchase Management order flag status (if this is a subcontract [activity job line](#)). A single [job line](#) cannot be used for more than one function.

From this window, the user can add [job lines](#) to or remove [job lines](#) from the [job](#) structure to match the requirements for any particular [job](#).

This view is used to monitor the overall progress of a [job](#), particularly to ensure that all external ordering of parts and services is completed before labour activities are started.

[Job Structure - Cost View](#)

This details all committed and actual [costs](#) for the entire [job](#) and for each individual [job line](#). It also displays any charges billed to the customer so far and calculates margins against the billed values and against the original [budgets](#).

This view is used to monitor the overall [costs](#) of the [job](#) so far against [budget](#), to highlight issues where the work is going over [budget](#).

From this window, the user can drill down to detailed transaction levels to view all bookings made against the [job](#).

[Job Structure - Resource View](#)

This details all target start dates and duration of each [job line](#) and allows the user to monitor that the [job](#) activities are being performed in the correct sequence and in good time.

From this window, the user can perform all resource management activities such as assigning, scheduling and despatching.

Status

[Jobs](#) are progressed through the Equipment Servicing application by means of [status codes](#).

[Status codes](#) occur in a range of 01-99 and are as follows:

Opt	Description
01*	Customer to send
02*	Collect from customer
07*	Credit problem
14*	Suggest accept for refurbish
15*	Suggest reject for refurbish
16	External order created (Sales Order Processing /PO)
20	Open
22	Assign
24	Schedule
26	Despatch
28	Work in progress
30	Complete not documented
55*	Ready for despatch
56*	Ready for despatch to workshop
57*	Ready for despatch to 3rd party
60*	Confirm despatch to customer
61*	Confirm despatch to workshop
62*	Confirm despatch to 3rd party
70*	Warranty claim
71*	Suggest rejection
72*	Suggest parts detail required
73*	Suggest information required
74*	Send questionnaire
75*	Suggest clearance
76*	Claim created
77*	Claim awaiting authorisation

78*	Claim printed
79*	Claim authorised
80*	Parts to be sent
81*	Cleared for credit
86*	Factory claim required
87*	Factory claim made
91*	Factory claim not made
92*	Factory claim rejected
93*	Factory claim accepted
94*	Warranty claim rejected for credit
95*	Warranty claim payment made
96*	Service exchange rejected
97*	Credit assessment rejected
98*	Cancelled
99*	Complete

Note: *Statuses marked with * can only be applied to the entire [job](#). Those not marked with * can only be applied at [job line](#) level.*

Note: *There is additional control to ensure that [job lines](#) in a certain status can only have appropriate status changes applied to them. This relationship is established via the Maintain Invalid Status/[Status Code](#) Combinations [task](#) on the [Company](#) Parameters menu.*

Statuses 01-19 indicate that the 'real' work by technicians cannot be done yet. Examples of these statuses are 01 (Customer to Send Machine), 06 (Parts to be Ordered) and 12 (Awaiting Quote/Estimate).

Statuses 20-30 are used to progress the [job line](#) through the technician assignment, scheduling, despatching and [job](#) reporting statuses.

Statuses 31-49 are reserved and are not used in this version of the application.

Statuses 50-69 indicate that manual work is completed and now the administrative statuses have to be performed. Generally these statuses are only applied to workshop and are used to control the movement of equipment back to the customer or out to another workshop.

Statuses 70-81 are reserved for the warranty claim module of equipment servicing. This is a dealer claim module where [jobs](#) are raised and progressed through the system but only for the purposes of issuing a credit note to the dealer, not to initiate work in the service [branch](#).

Statuses 86-87 are reserved for the factory claim process. All warranty [jobs](#), whether for field service or workshop, will be set to 86 to force the users either to place a claim or to indicate that a claim is not being made.

Statuses 91-99 are the completion statuses for the system. Any [job](#) with a status above 90 is complete and the status only indicates the way in which it was completed for analysis purposes. For example, all [jobs](#) with status 92 had a claim against the factory but the claim was rejected and all [jobs](#) with status 95 had a dealer claim against them and the claim was accepted and paid.

Once a [job line](#) gets to a status of 50 or above, it is not possible to set its status back to a value less than 50.

Because the prime [job line](#) cannot have labour hours, parts or subcontract activities attached to it, its status will always reflect the lowest status of any [job line](#) in its [job](#) structure.

The same rule applies to any [sub-jobs](#), if they have no labour, parts or subcontract activities attached. The status will always reflect the lowest status of its associated [job tasks](#).

Every status change in the system will [call](#) up a roll-up processor to ensure that all the statuses are updated correctly. This roll-up processor is workflow-enabled and if the status is flagged for workflow, any process flow associated with it will be activated for the status change. For example, a status change of 13 to 14 may have a workflow associated with it: to send an e-mail to alert the service exchange [manager](#) that a credit may need to be issued.

Special Status Flows

Parts [job lines](#) and subcontract line both have special statuses that cannot be applied to labour lines. When a single part is created against a [job line](#) or subcontract details are entered against a [job line](#), the status is automatically set to 06. Once the [Sales Order Processing](#) order or purchase order is actually created, the status will automatically be set to be 16. Once the order is despatched through [Sales Order Processing](#) or the purchase order is received through Goods Receiving, the status is set to 50.

Warranty [jobs](#) have special statuses to enable factory claim processing. When a warranty field service [job](#) is completed through [job](#) completion, its status will automatically be set to status 86 (Factory Claim Required). Workshop [jobs](#) have to wait until the equipment has been despatched back to the customer before the factory claim can be made.

Service exchange [jobs](#) are originally set to status 01 (Customer to Send). When the unit is booked in, the status is set to 13 (Evaluation Required). The status acts as a prompt for a technician to evaluate whether the unit is worth refurbishing. If the [job](#) is manually set to status 14 using Work Control, the refurbishment is worthwhile. If the technician sets it to 15, the unit is not worth refurbishing and the credit to the customer should not be issued. There is a Service Exchange maintenance function where an authorised user decides to accept the technician's assessment. The technician can raise a credit note and set the status to 20 (Open) to start work, or confirm the rejection and set the status to 96 (Service Exchange Rejected).

The same status flow applies to credit assessment, except that if the rejection is confirmed, the status is set to 97 (Credit Assessment Rejected).

The objective of all [jobs](#) flowing through the system is to get to a status of 50 where all 'actual work' is complete. There can be restrictions throughout the system that may prevent further progression of the [job](#) until all [job lines](#) are at a status of 50. For instance, a [job](#) that has a [quotation](#) cannot have its

lines released for invoicing until all [job lines](#) are either cancelled or completed. A quoted [job](#) can only be invoiced once.

Technician Timesheets

This is the facility used to enter the details of completed work from the technician. It is accessed by selecting the [Timesheet Entry task](#). For each [timesheet](#) entry, various details that apply to all of the transactions can be entered on the header. These include technician number, [job](#) number, [visit](#) date and posting period.

Hours

Hours spent on each piece of equipment are entered, qualified by a four-level reporting code hierarchy. Both labour and travel time can be booked at up to four different rates, i.e. basic plus three overtime rates. The hours are classified as non-chargeable (0%) or chargeable (100%), according to the charge matrix for the [contract type/job category](#) combination defined; the charge percentage can be changed to any intermediate value between 0% and 100%.

Expenses

Miscellaneous [costs](#) incurred in carrying out the service or repair of each piece of equipment are entered. For each [cost](#), a charge type code (with its file or user-overridden description), the [cost](#) value and charge value are entered/displayed, or the charge is derived by using a default percentage uplift from the [Job Category](#) file.

It is also possible to enter a distance driven in miles or kilometres, which will be used as a distance charge against the [job](#). This is the only way to enter distance transactions against the [job](#).

A [job](#) may require more than one technician [visit](#) to complete the work, in which case several [timesheets](#) can be entered. After the final [timesheet](#) is entered, the user indicates that the [job](#) is finished by setting a complete flag and the status of the [job](#) changes to 50. At any point during the life cycle of the [job](#), it is possible to invoice those transactions created so far. In addition, it is possible to complete the [job](#) in an ad-hoc way or leave it open so that further [timesheets](#) can be entered later.

Job Transactions

There are various types of transactions processed by Equipment Servicing. Each transaction will always have a [cost](#) element and a revenue element, if the transaction is chargeable. These values are visible in the [Job Structure - Cost](#) view during the lifecycle of the [job](#). [Costs](#) and revenue are held at line level and rolled up to [sub-job](#) and prime [job](#) level.

Labour Transactions

Labour transactions are input via the [Timesheet Entry task](#) and are treated as labour [cost](#) commitments until the [timesheets](#) have been reconciled and posted. After posting, the [costs](#) become actuals against the [job line](#). Many technicians can report against a [job line](#).

Parts Transactions

Parts transactions are input via the Parts Ordering [task](#) and are treated as Inventory commitments until despatched via the [Sales Order Processing](#) Despatching function. Parts can also be booked directly to the [job](#) using the Parts Reporting [task](#) and will become actual [costs](#) without going through the commitment stage.

Expenses

Expenses can be booked either in association with a [timesheet](#) entry or as a stand-alone expense entry. In both cases, the [costs](#) are posted as actuals and do not go through the commitment stage.

Direct Transactions

Direct transactions can be entered via the Direct Transactions [task](#) or via [Accounts Payable](#). In both cases, the [costs](#) are posted as actuals and do not go through the commitment stage.

Subcontract Transactions

Subcontract activities are controlled by raising a type 5 purchase order against a subcontract line. Purchase Order Release will post the purchase order [cost](#) as a commitment on the [job line](#). The commitments will become an actual [cost](#) on the [job](#) either when the purchase order is received in Goods Receiving or when it is matched using Invoice Matching. The route used is controlled by an indicator in the EQ [company](#) profile.

Standing Costs

[Standing costs](#) simplify the posting of [costs](#) against a [job](#) number, where the [cost](#) could be deemed to be regular or standard. For instance, rent of machinery could be a standard [cost](#) with a fixed currency, an [expense type](#), a [transaction type](#) and [charge code](#). Instead of entering these details in the Direct Transactions [task](#), it is possible to choose the standing reference and enter the amount. Each standing reference has an associated set of [job](#) numbers (i.e. [job/sub-job/task](#)). Reversible [standing costs](#) can also be set up to deal with periodic accruals.

Job Completion

This facility is used to release actual transactions for invoicing. Transactions can be manually selected for billing and other transactions can be left for billing later.

The amount to be billed can be changed at individual transaction level by changing either the billable amount or the billable percentage.

It is also possible to fix the price of the whole [job](#) at this point. If the price for the [job](#) is fixed in [job](#) completion, any visible transactions and any subsequent transactions are priced at 0.

For [jobs](#) that were initially [quotations](#), it is not possible to change the billable values, as these are fixed from the [quotation](#) and it is not possible to release any transactions until all [job lines](#) on the [job](#) are completed or cancelled.

The function can be used for any [job](#) but is only mandatory for a [job category](#) flagged as requiring formal completion. Other [job](#) categories are automatically released for invoicing by the [Job Completion task](#).

Job Pricing and Invoicing

[Jobs](#) which are not fully covered under the [terms](#) of a [service contract](#) need to be charged to the customer. The pricing of [jobs](#) happens as each transaction is entered into the system. Invoicing happens after the [Job Completion task](#) has run.

The decision as to which [jobs](#), or elements of [jobs](#), are chargeable is made by referencing the user-defined matrix of [contract types](#) and [job](#) categories. For the particular combination, the matrix indicates whether labour and/or travel distance and/or travel time and/or miscellaneous [costs](#) and/or four types of parts are chargeable to the customer.

Six types of charge can potentially appear on a [job](#) invoice:

[Contract Visit Fee](#)

[Service contracts](#) can include fixed [visit](#) charges, to be invoiced after each [visit](#), the [contract's](#) billing parameters being set accordingly. Such [visits](#) are invoiced through [job](#) invoicing at [call](#) completion.

The fixed [visit](#) charge is obtained from the [contract visit](#) record.

Labour

The labour charge is calculated from the number of hours booked on the [timesheet](#), multiplied by the hourly rate on the labour price list. The hourly rate will be uplifted by a premium factor for work performed at overtime rates.

A fixed labour charge may be applied, if required by the [job's](#) charge matrix as set up in the Maintain [Cover Type/Job Category task](#).

Travel Labour

The travel time is calculated from the number of customer travel hours and minutes booked on the technician's [timesheet](#) multiplied by the hourly rate from the price list.

A fixed travel labour charge may be applied, if required by the [job's](#) charge matrix as set up in Maintain [Cover Type/Job Category task](#).

Parts

The charge for parts used by the technician is calculated according to the price list and discount list acquired from the hierarchy. The price and discount list details are obtained from [Sales Order Processing](#).

Miscellaneous [Costs](#)

The charges are based on the values entered through the technician expenses or subcontract functions.

Distance Driven

The charges may be based on a standard distance value, the actual distance driven, or zones. Data is set up on the Additional Service Details record for each [site](#).

All [jobs](#), even non-chargeable ones, should be processed through the [job](#) pricing and invoicing functions so that the financial management systems can best report the [costs](#).

Pricing Calculations

Labour and Travel Time

A transaction is designated as labour or travel hours if it is entered in an 'hours' bucket on a technician [timesheet](#). These transactions are written against a [job](#) with a user-designated [uplift code](#).

It is possible that the [cover type/job category](#) matrix has fixed prices set up for travel and labour. These prices are fixed prices for the first hours used on a [task](#) (not on a [job](#)). Any subsequent hours booked will be at the standard charges applicable to the transaction.

Labour/travel time can be charged in one of two ways, depending on a [company](#) profile setting: it can be charged by rate or by grade.

In both cases, there is a hierarchy of possible price lists that can be used. Equipment Servicing uses the hierarchy to identify the list number to be used and then accesses the rate or grades price file as appropriate.

The labour/travel price list can be stored in the following hierarchy and the system will find and use the first list that it can.

- 1 Contract Conditions
- 2 Contract Equipment
- 3 Contract Header
- 4 Job Category/Customer
- 5 Job Category
- 6 Customer
- 7 Model
- 8 Model Sub-group
- 9 Model Group
- 10 Model Division
- 11 Branch
- 12 Company Profile

The price lists and prices are entered in a currency. When the retrieval is performed, the currency used is that of the billing customer of the [job](#), which may be different from the customer held against the prime [job](#).

If rate-based pricing is in effect, the price list will be used to access the lists set up in the Maintain [Job Category/Labour Price Lists task](#). These price lists store separate prices for travel time, service labour and workshop labour. Therefore, the price selected will be dependent on the [job category](#), i.e. it will use the service price for [job](#) categories defined as field service and the workshop price for the others. The travel rate will be used for any travel time entered.

If grade-based pricing is in effect, the price list will be used to access the lists set up in the Maintain [Cost/Price List task](#). These lists store a series of prices per grade and a default price for the list. Therefore the technician's grade will be used to access the list and if a price is found, it will be used.

If a price is not found for the specific technician grade, the default price will be used for all transactions (i.e. the same price for all [jobs](#) irrespective of [job category](#)).

Note: A flag denoting the grade for automatic [quotation](#) creation is held in the Equipment Servicing Descriptions file, under type EGRD, against the grade to be used as default.

Once the labour/travel price is found, it is uplifted by an invoice factor which is stored in the [Timesheet](#) Uplift file. When the technician [timesheet](#) is entered, the [uplift code](#) is applied to each labour/travel booking made.

Note: The labour hours entered on the template and used for automatic [quotation](#) creation are assumed to be base hours i.e. the [uplift code](#) designated for column 1.

Parts

Parts transactions are designated as a result of being entered via a Sales Order despatch or as a transaction created in the Parts Reporting [task](#) within Equipment Servicing.

Parts are charged based on a price held on a price list. The price lists are maintained in [Sales Order Processing](#) and are retrieved using a hierarchy of list codes. Equipment Servicing uses the hierarchy to identify the list number to be used and then accesses the price that is applicable.

The parts price list can be stored in the following hierarchy and the system will find/use the first list that it can.

- 1 From OE - If the flag is set in the EQ company profile, the parts price list from the OE Customer record
- 2 Contract Conditions
- 3 Contract Equipment
- 4 Contract Header
- 5 Customer
- 6 Model
- 7 Model Sub-group
- 8 Model Group
- 9 Model Division
- 10 Company Profile

If pricing in the [Sales Order Processing company](#) profile is set to Advanced, the price lists that can be entered/prompted are Advanced Price Types and pricing acts as if an override price type had been entered on a sales order line.

If pricing in the [Sales Order Processing company](#) profile is set to Standard, the price lists that can be entered/prompted are Standard Price Lists and pricing acts as if the price list entered is the only valid one on which the part can be found.

Miscellaneous Charges

Miscellaneous charges are created in a number of ways throughout the system.

- 1 Technician expense claims (non-distance)
- 2 Direct transactions
- 3 Subcontract items

Although the transactions entered may have different charge types/[expense types](#), etc., they are all designated as miscellaneous charges.

Most miscellaneous charges entered have an associated [cost](#) and either an invoice price or an uplift percentage to use to decide the invoice price.

Distance Driven

Transactions are designated as distance transactions when they are entered in technician expenses as either miles or kilometres driven.

This is the only way to designate something as a distance transaction.

Distance (mileage) is charged in one of three ways:

- 1 Distance driven (distance entered x per mile/km customer charge)
- 2 Standard charge (from the customer)
- 3 Zone charge (from the zone attached to the customer)

The type of charge that will be applied to a distance transaction will be decided by the billing customer on the [job](#).

Each customer has a designated method of charging distance and the corresponding calculation is performed.

Pending Invoice Maintenance

This facility is used to release [pending invoice lines](#) for invoicing.

[Pending invoice lines](#) can be manually selected for invoicing immediately or flagged so that they are invoiced in batch using the Generate and Print [Job Invoices batch task](#).

The amount to be billed can be changed at individual transaction level or a [job](#) discount can be applied to the entire [job](#).

It is also possible to fix the price of the whole [job](#) at this point. If the price for the [job](#) is fixed in the Maintain [Pending Invoice Line task](#), any visible transactions and any subsequent transactions are priced at 0.

For [jobs](#) that were initially [quotations](#), it is not possible to change the billable values, as these are fixed from the [quotation](#).

The invoice customer can be changed for all or part of a [job](#). This allows you to invoice another valid customer for part of the [job](#). An example would be where an insurance [company](#) will pay for everything above the excess on a repair.

The function can be used for any [job](#) but is only mandatory for a [job category](#) flagged as requiring pending invoice review for invoices. Other [job](#) categories are automatically released and will be included in the next run of the Generate and Print [Job Invoices task](#).

Job Escalation

Equipment Servicing provides facilities for alerting you to any [jobs](#) that are approaching their designated response time and are still outstanding. [Job](#) escalation is started and ended by [tasks](#) within the L1 (Generic Systems) application, and runs as long as the Equipment Servicing subsystem is active. If the subsystem is inactive, start it by using the [task](#) within the L1 application.

All [jobs](#) created in the system will be stamped with a target response date and time, which is calculated as follows:

For [call](#) out [jobs](#) (i.e. those entered on the system using the [Call Logging task](#)), the target response date and time is calculated as:

Date/time [call](#) logged + response hours

where response hours is derived from the special [serial numbers](#) file, or the [contract](#) which covers the piece of equipment if a [contract](#) exists. If the equipment is not covered by [contract](#), the response hours default to the value for the [contract type](#) *NO. Manual overrides of the response hours may be made, if special circumstances arise.

In calculating the target response date and time, the system takes into account working/non-working days, and the standard service window for the [company](#), i.e. the times of the day between which service is provided. These are all user-defined.

For planned [jobs](#) (i.e. those generated from the service schedules defined for [contracts](#)), the target response date and time is calculated as:

Target date = date of last working day of the [service period](#) in which the [job](#) is scheduled

Target time = start time of the working day

Parameters which determine the escalation time fence, the interval between each escalation step, and the users who are to be alerted at each step, are all user-defined. The system monitors each outstanding [job](#), comparing its target date and time with the current system date and time. Once the [job](#) enters the defined escalation time fence, it will start to escalate and will have its escalation step re-calculated at frequent intervals, the escalation step moving from high to low value as the [job](#) approaches its target date and time. Escalation step zero denotes that the [job](#) has reached (or gone beyond) its target time.

Note: *The system assumes a 7-day working week. If fewer days are actually worked, the system still escalates what would be Monday's work on a Sunday, not on the preceding Friday.*

As a [job](#) moves from one escalation step to the next, the system can send a message to pre-defined users to alert them to the fact that the [job](#) has been escalated to the next level, thereby allowing them to take appropriate action.

[Jobs](#) will be removed from the escalation procedure once they reach a certain status. This is user-defined within the [Job Line Status Code](#) Record; for example, escalation may be required to stop

once the [job](#) is allocated to a technician, or once the technician has arrived and started work. An enquiry window allows the escalation status of [jobs](#) to be viewed easily, using various selection parameters.

Example of [Call](#) Escalation

Escalation Step	Reporting Times (1-hour intervals)	
0	16:00	Target Time
1	15:00	
2	14:00	
3	13:00	
4	12:00	Escalation Time Fence (4 hours) starts

In the above example, the escalation time fence is set to 4 hours and the reporting interval to 1 hour.

A [job](#) with target time of 16:00 will start to escalate at 12:00.

Between 12:00 and 12:59, the escalation step will be calculated as 4, because the [job](#) is within 4 hours of target.

Between 13:00 and 13:59, the escalation step will be calculated as 3, because the [job](#) is within 3 hours of target, etc.

At 16:00 or later, the escalation step will be calculated as 0, because the [job](#) has reached or passed its target time.

Warranty Claims

This is a financial module attached to Equipment Servicing that you can use to create credit notes for dealers because of warranty claims against the supplier. This module uses all the customer, parts and [models](#) information you entered in Equipment Servicing.

If a customer can make warranty claims, you must set the Warranty Claim flag in the customer's additional details to parts, labour, or both parts and labour. You also set the labour rate list to use for the warranty claim in the customer's additional details.

You can use this function to:

- Enter the warranty claim data, such as [model](#), fault, purchase date, customer details, and dealer information.
- Record any parts used during the repair.
- Validate the data entered.
- Accept the claim and automatically create a [Sales Order Processing](#) credit note for labour or parts or both.

- Reject the claim with the appropriate reason and produce a letter stating the reason for the rejection.
- Maintain the credit status of the customer making the claim.

The validation process checks all the claim details and recommends that the claim should be accepted or rejected or suggests that you need more information before you can process the claim further.

This function also provides facilities to analyse the warranty claim data. You can:

- Search for other faults and repairs on this [model](#) and [serial number](#).
- Check if parts have been claimed for before using the same invoice number.
- Display and audit all stages through which the claim has passed.

Once you have accepted or rejected a claim, Equipment Servicing archives the claim.

Time Zones

This function enables you to operate across different time zones. The zones are specified as a number of hours' difference ([called](#) the offset time) from the system time. You can specify zones at [branch](#) level and at customer additional details level.

Once you have specified the offset time, when service [calls](#) are received, the customer's date and time are recorded with them, and are used to calculate target times.

The time zone offset times are set up in the Inventory Descriptions file under major code TIMZ.

Month End cost revaluation

In some countries it is necessary to revalue Parts and Labour [cost](#) transactions at month end according to rules laid down by the government of the country.

The purpose of the Month End Revaluation is to generate another set of [cost](#) transactions that will update [costs](#) on the [job](#) and [WIP costs](#) within the GL.

Enquiries

Equipment Servicing provides a comprehensive range of enquiries for:

Master Files

These generally show the same details as their counterpart maintenance routines.

Transaction History

A [job](#) history enquiry is available for viewing details of historical service work performed against equipment.

The [job](#) enquiry requires selection of [job](#) enquiry by customer or [job](#) number, subject to [status code](#).

The [job](#) details enquiry provides standard information on the set up details, as well as values for [costs](#), [budgets](#), variances and invoices to date. Similar information can be provided on both [sub-job](#) and [task](#) enquiry details. Further financial details are displayed for rolled-up and this-level details. This information can be reviewed in more detail, i.e.:

- Commitments (Purchase Management or Inventory Management)
- Invoices
- Price variances
- [Stage payments](#)
- [Cost](#) breakdown this level
- Indented [cost](#) breakdown
- Alternative [budgets](#)

An invoice enquiry is available for viewing details of an invoice and whether it is a [contract](#), [job](#) or sundry invoice.

Status

An escalation enquiry provides up-to-date information on the escalation status of service [jobs](#).

Session Enquiries

The initial window requests an entry via a transaction reference number or a session number. The enquiry by session number has drill-down facilities, to view transaction, source and destination details.

Loading Equipment Servicing Data

The following data must be loaded for each service [company](#) which is to be processed within the live application.

The data is divided into two groups:

- Basic data - data used mainly for reference purposes, which is low in volume and not subject to ongoing change, e.g. codes
- Major data - data which constitutes the bulk of the application and is subject to regular change, e.g. customers, [contracts](#), etc.

Some of the data listed below is marked as optional. This means that, in system [terms](#), the data is not essential to running the application, but note that in practice the data may well be essential (e.g. [contracts](#)).

Basic (Parameter) Data

- [Company](#) Profile
- System Parameters File
- [Branch](#) Records
 - One for each service [branch](#)
- User/[Branch](#) Authority Records
 - One for each user and [branch](#) (to which the user is authorised) combination
- Codes/Parameter File Records

System-required parameters are identified by * in the first position of the Parameter Type description: these must be set up, or copied from the demonstration data supplied. In addition, set up appropriate code values for each of the following types:

- ABSC (Technician absent)
- CCRC ([Contract](#) cancellation reasons)
- CORA (Corrective actions)
- DAYT (Day types)
- EGRD (Technician grades)
- FLTC (Faults)
- REGN (Service regions)
- RRES (Credit release reason)
- STAT (Equipment status)
- TXTO (Text destinations)
- Calendar Control Record
- Daily Calendar File (and Rebuild Period End Dates)
 - For all years over which current [service contracts](#) are spread
- [Division](#) Records
 - One for each service [division](#)
- [Model](#) Group/Sub-Group Records
 - One for each [model](#) group/sub-group combination
- Geocode/Territory Records (optional)
 - One for each service territory, with a list of geocodes (postal codes) within the territory
- [Field Service Group](#)
 - One for each group or equipment ([division/model](#) family/[model](#) to be serviced)
- Team
 - One for each technician team
- District

- One for each work controller, to authorise work on teams
- Technician Records
 - One for each service technician
- Labour Rates Price List Records
 - One for each set of labour rates to be linked with [models](#) (and for different currencies where [World Trade](#) and [Multi-currency](#) are active)
- Zone Charge (optional)
 - One for each zone (and currency where [World Trade](#) and [Multi-currency](#) are active)
- [Model](#) Records
 - One for each [model](#) code
- Volume Segment
 - Minimum one, optionally more for each [model](#), or group of [models](#)
- [Job Category](#) Records
 - One for each [job category](#) code
- [Scheduled Visit Profile](#) Records (optional)
 - One for each standard schedule of planned maintenance [visits](#)
- [Contract Type](#) Records
 - One for each [contract type](#) code
- [Contract Type/Job Category](#) Records
 - One for each valid combination of [contract type](#), [job category](#), (and currency where [World Trade](#) and [Multi-currency](#) are active) with invoicing indicators
- [Contract](#) Rates Records (optional)
- Escalation Parameters (optional)
- Tax Codes (for [World Trade](#) and [Multi-currency](#) only)
 - For each country's [contract type/job category](#) combinations

Inventory Descriptions File

DEPT (Departments)

- SS Service Workshop
- S3 Service

MANT (Mantle Groupings)

- A - Attack Customers

- C - Central Govt. Depts.
- L - Local Govt. Depts.
- M - Multi-nationals
- S - Special Customers

MFID (Manufacturer's ID)

- * - Mfr not specified
- BRIT - Briton Ferry Steel Co Ltd
- EAGL - Eaglesbush Nuts and Bolts
- FALC - Falcon Electrical
- GRU - Herbert Grudgings (Spares)
- JONE - Jones Britannia Foundry Ltd
- ROKI - Rock Island Arsenal (NJ) Ltd
- STEP - Steptoe and Son Precision Engrs
- TAY - Taylor Technicians (Rothley)
- WRAY - Wray Optical Co Ltd

OTHR (Customer Search Parameters)

- END1 - Cust. account no. 9
- END2 - 'Phone no.332
- START1 - Cust. account no. 2
- START2 - 'Phone no. 313

PTYP (Item Type)

4 codes are essential to categorise parts:

- C - Consumables
- J - Major spares
- N - Minor spares
- S - Supply items

2 codes assist analysis of machine sales:

- M - Machine sale via [Sales Order Processing](#)
- P - Peripheral sale via [Sales Order Processing](#)

SPED (Urgency Indicator)

- 1 - Special courier: ETA TBA
- 2 - By noon tomorrow: promised
- 3 - By noon tomorrow: guaranteed
- 4 - 24-hour delivery: guaranteed
- 5 - By 17:30 today
- 6 - By 22:00 Monday

STKU (Stockroom Usage Code)

- B - Service spares stockroom
- W - Service workshop: [company](#) stock
- X - Service workshop: customer stock

TIMZ (Time Zones)

- E01 - East + 1 hour
- E02 - East + 2 hours
- E03 - East + 3 hours
- W01 - West - 1 hour
- W02 - West - 2 hours
- W03 - West - 3 hours

SUND (Free-format Sundry Credit Note)

- Userid - The user IDs that are allowed to raise EQ Sundry Credit notes

Major Data Required

- Customer Account Records
One for each customer account
- [Installation Address](#) Records
One for each [site](#) address, within a customer account
- Customer Additional Details (Equipment Servicing) Records
One for each customer [site](#)
- [Installation](#) Records
For each customer [site](#), details of each piece of equipment at the [site](#)
- [Contract](#) Records (optional)
One for each active [service contract](#), with details of each piece of equipment covered and service schedules

Operational Considerations

This section describes some operational considerations.

- How many [branches](#) are to be created within the [company](#)?

Roles and responsibilities:

- Integration of EQ with other applications
- Day to day supervision of the running of Equipment Servicing

- System maintenance
- Utilities work
- [Call](#) logging
- Work control and resource management
- Billing and invoicing control

User profiles:

- Which menu options should the users have access to?
- Which [branches](#) should the user have access to?
- Which teams can the user manipulate, if any?
- Which work control functions can the user perform?

Conversion:

- Are customers to be converted?
- Is equipment to be converted?
- Are open [jobs](#) to be converted?
- Are closed [jobs](#) to be converted?
- Are [contracts](#) to be converted?

[Company](#) file:

- Which defaults are to be used?
- The item type to be used for billing has to be shared with IN. The appropriate values have to be agreed.

[Job category](#):

- The settings in this file will control major processing within the [company](#). The [job](#) categories and settings must be confirmed before going live.

Batch subsystems (of which EQ has 3)

- How often should the batch [jobs](#) be run?
- How should the batch [jobs](#) be started?

Reports

- Which reports should be run?
- How often?

Chapter 2 Company Profile Maintenance

Maintain Company Profile [1/EQP]

Use this [task](#) to set up and maintain the fields that control the way in which Equipment Servicing works for a specific [company](#). This is where you make many key decisions about how you operate Equipment Servicing.

Note: You must have exclusive use of Equipment Servicing to use this [task](#).

Note: Any modification to the data in the [Company Profile](#) will be audited.

A [company](#) is completely self-contained within Equipment Servicing. You can sub-divide it into [branches](#), but these [branches](#) all operate under the controlling parameters defined for the [company](#).

The [company](#) profile is where you decide which other modules (the ledgers, [Sales Order Processing](#), Inventory Management, etc.) integrate with Equipment Servicing.

Integration with other modules is vital for:

- Inventory Management to check the technician's stock
- [Sales Order Processing](#) to price parts

Caution: It is strongly recommended you use the Copy Company task to create a new company. This copies existing parameters and miscellaneous codes to your new company. You can then amend these details using this maintenance task.

Company Profile Maintenance Selection Window

To display this window, select the Maintain [Company Profile](#) [task](#).

Use this window to select the [company](#) you want to maintain.

Fields

Enter Company Code to Maintain

If you are setting up a new [company](#), enter a two-character [company](#) code. You can also enter an existing [company](#), so you do not have to scroll through the list of companies.

Select a [company](#) or enter a [company](#) and then press Enter to display the [Company](#) Profile Maintenance General window.

Company Profile Maintenance General Window

To display this window, select a [company](#) or enter a [company](#) and then press Enter on the [Company](#) Profile Maintenance Selection window.

Use this window to specify the basic details, such as [job](#) and invoice numbers, for the selected [company](#).

Fields

Company Name

For a multi-[company](#) environment, this defaults from Application [Manager](#). Use the Maintain [Company](#) Parameters [task](#) in Application [Manager](#) to set up the [company](#) name.

For a stand-alone [installation](#), enter up to 30 alphanumeric characters.

Last Job Number

If you are setting up a [company](#), enter the number before the first [job](#) number to be used.

Otherwise, this field displays the last [job](#) number used. When the software assigns the next [job](#) number, this field is incremented by 1.

Note: Once you start using Equipment Servicing, do not change the last [job](#), invoice, credit note or [contract](#) number.

Last Contract Number

If you are setting up a [company](#), enter the number before the first [contract](#) number.

Otherwise, this field displays the last [contract](#) number used. When the software assigns the next [contract](#) number, this field is incremented by 1.

New Contract Number at Renewal

Use this checkbox as follows:

- Unchecked - To use the existing [contract](#) number when you renew a [contract](#)
- Checked - To assign a new [contract](#) number when you renew a [contract](#)

Validate Post Codes

Use this checkbox as follows:

- Unchecked - To prevent the software from validating the postcode fields

You can then use the postcode fields for any geocode you devise.

- Checked - To make the software check that the postcode fields conform to the UK postcode format standards

The software transfers the postcode from the module in which you set it up ([Accounts Receivable](#)) and highlights it if the postcode format is not correct.

Use Geocode/UK Post Code Rules for Team Assignment

To define how the software matches the teams, enter one of the following:

1 - Postcode

Equipment Servicing first looks for a complete postcode match between customer and team. If it finds no match, it makes successive tests, reducing the customer's postcode by one character each time. If the postcode starts with two alpha characters, the final test is for a match on the first two characters of the customer's postcode. Equipment Servicing does not test on the first character, so, for example, it never reduces BR for Bristol to B for Birmingham.

2 - Geocode

Equipment Servicing first looks for a complete geocode match between customer and team. If it finds no match, it makes successive tests, reducing the customer's geocode by one character each time, the final test being for a match on just the first character of the customer's geocode.

If there is no match, Equipment Servicing assigns the [job](#) to a default team (*DF), authorised to service anything. You can assign the actual team to work on the [job](#) during [call](#) logging, or in Work Control.

Manual Technician Allocation across Branch

Use this checkbox as follows:

Unchecked - For manual assignments, to allow only technicians based at the [branch](#) of the piece of equipment to be assigned

Checked - For manual assignments, to allow a technician from any [branch](#) to be assigned to a [job](#)

Assign by Alternative Technician or Territory

This feature is not available in this release of the application.

Hard Copy Job Audit Log Required

Use this checkbox as follows:

Unchecked - If you do not require an audit report of all changes to [jobs](#)

Checked - If you require an audit report that prints every [job](#) added, deleted or modified

Accounting Period

Enter the posting period for all invoice generating routines. The software makes [Accounts Receivable](#) postings to the [Accounts Receivable](#) open period, if it is later than the period indicated here.

You must manually re-set this at each period end.

Accounting Year

Enter the posting year for all invoice generating routines. The software makes [Accounts Receivable](#) postings to the [Accounts Receivable](#) open period and year, if it is later than the year indicated here.

You must manually re-set this at each year end.

Currency Rate Code

Enter the currency rate code to be used by default.

Alternatively, use the prompt facility to select from the Select Currency Rate Code pop-up.

Functions

Reference Numbers

Use this to display the Reference Number Entry pop-up.

Production Functions

Use this to display the [Company](#) Profile Update Production Functions window.

Press Enter to display the [Company](#) Profile Maintenance Relationships window.

Company Profile Maintenance Relationships Window

To display this window, press Enter on the [Company](#) Profile Maintenance General window.

Use this window to specify the relationships with the other modules.

Fields

General Ledger Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with [General Ledger](#)

Note: This field should always be checked, as [General Ledger](#) is a pre-requisite for EQ.

Accounts Payable Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with [Accounts Payable](#)

Accounts Receivable Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with [Accounts Receivable](#)

Note: This field should always be checked, as [Accounts Receivable](#) is a pre-requisite for EQ.

Inventory Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with Inventory Management

S.O.P. Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with [Sales Order Processing](#)

Purchase Management Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with Purchase Order Management

Note: This is required for subcontract processing.

Fixed Assets Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with Fixed Assets

Service Management Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with an external application

Note: This interface is currently not supported.

Customer Returns Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with Customer Returns

Note: This interface is currently not supported.

Vertex Active

Use this checkbox as follows:

Unchecked - To use Equipment Servicing as a stand-alone application

Checked - To integrate Equipment Servicing with Vertex

Unit Charges in Pence or Pounds

Select one of the following:

Pence - If, when entering meter charges, 20.00 would be recognised as 20p

Pounds - If, when entering meter charges, 20.00 would be recognised as £20

Use SOP Standard Price Lists

Use this checkbox as follows:

Unchecked - To use the Equipment Servicing price list hierarchy for parts price list retrieval

Checked - To have the customer price list from OEP20 as the highest point in the Parts price list retrieval process

Default Labour Rate Price List Code

You can optionally use this field to indicate the lowest level of price list retrieval if using labour pricing by rate. However, once the system has been set up it should be entered as the top-level default.

Default Labour Cost List Code

You must enter a valid [cost](#) list code.

Alternatively, use the prompt facility to select from the Select [Cost](#) List pop-up.

Press Enter to display the [Company](#) Profile Maintenance Codes window.

Company Profile Maintenance Codes

To display this window, press Enter on the [Company](#) Profile Maintenance Relationships window.

Use this window to specify the expense codes, [transaction types](#) and [charge codes](#) for default transactions within the Equipment Servicing system.

Fields

Inventory Expense Type

Enter the [expense type](#) to which you attach all Inventory transactions.

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

This [expense type](#) is used for all parts used by Equipment Servicing via [Order Entry](#) and those entered via the Parts Reporting [task](#).

This must be different from the [expense types](#) entered for [timesheets](#) and expenses.

Inventory Transaction Type

Enter the [transaction type](#) to use for Inventory transactions.

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

Make sure you add the [expense type](#) for Inventory to all [job](#) categories.

This [transaction type](#) is used for all parts used by Equipment Servicing via [Order Entry](#) and those entered via the Parts Reporting [task](#).

Inventory Charge Code

Enter the [charge code](#) to use for Inventory transactions.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

This [charge code](#) is used for all parts used by Equipment Servicing via [Order Entry](#) and those entered via the Parts Reporting [task](#).

Timesheets Expense Type

Enter the [expense type](#) to which you attach all labour [timesheets](#).

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Make sure that you add the [expense type](#) for [timesheets](#) to all required [job](#) categories.

This [expense type](#) is used for all labour transactions generated via the [Timesheet](#) system.

This must be different from the [expense types](#) entered for Inventory and expenses.

Timesheets Transaction Type

Enter the [transaction type](#) to use for labour [timesheet](#) entries.

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

This [transaction type](#) is used for all labour transactions generated via the [Timesheet](#) system.

Timesheets Charge Code

Enter the [charge code](#) to use for labour [timesheet](#) entries.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

This [charge code](#) is used for all labour transactions generated via the [Timesheet](#) system.

Travel Hours Expense Type

Enter the [expense type](#) to which you attach all travel hours on [timesheets](#).

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Make sure that you add the [expense type](#) for travel to all required [job](#) categories.

This [expense type](#) is used for all travel time transactions generated via the [Timesheet](#) system.

This must be different from the [expense types](#) entered for Inventory and expenses.

Travel Hours Transaction Type

Enter the [transaction type](#) to use for travel hours on [timesheets](#).

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

This [transaction type](#) is used for all travel time transactions generated via the [Timesheet](#) system.

Travel Hours Charge Code

Enter the [charge code](#) to use for travel [timesheet](#) entries.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

This [charge code](#) is used for all travel time transactions generated via the [Timesheet](#) system.

Sub-contractors Expense Type

Enter the [expense type](#) to which you attach all subcontract transactions.

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Make sure that you add the subcontract [expense type](#) to all required [job](#) categories.

This [expense type](#) is used for all subcontract transactions generated via the Purchase Order Management interface.

Sub-contractors Transaction Type

Enter the [transaction type](#) to use for subcontract transactions.

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

This [transaction type](#) is used for all subcontract transactions generated via the Purchase Order Management interface.

Sub-contractors Charge Code

Enter the [charge code](#) to use for subcontract entries.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

This [charge code](#) is used for all subcontract transactions generated via the Purchase Order Management interface.

Expenses Expense Type

Enter the [expense type](#) to which you attach all [employee expenses](#).

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Make sure that you add the [expense type](#) for [employee expenses](#) to all required [job](#) types.

This [expense type](#) is used for all [employee expenses](#) entered via the [Timesheet](#) system.

This must be different from the [expense types](#) entered for Inventory transaction data and [timesheets](#).

Expenses Transaction Type

Enter the [transaction type](#) to use for [employee expenses](#).

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

This [transaction type](#) is used for all [employee expenses](#) entered via the [Timesheet](#) system.

Default Budget Code

Enter the [budget](#) to use for [budgeting jobs](#).

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

This code is used as the default when you are enquiring on [job](#) details.

After you have used the [budget](#), you can change this code

Press Enter to display the [Company](#) Profile Maintenance Planning window.

Company Profile Maintenance Planning Window

To display this window, press Enter on the [Company](#) Profile Maintenance Codes window.

Use this window to specify the parameters regarding the planning of [jobs](#).

Fields

Default Scheduled Service Visit Profile

Enter a schedule [visit](#) profile. [Contract](#) maintenance and renewal use the default profile when you generate a maintenance [visit](#) schedule, if the equipment has no profile defined for the [contract](#), the [model](#) or the [model](#) group.

A [visit](#) profile generates scheduled service [visits](#) for each piece of equipment on a [contract](#). The software looks for the relevant profile according to the following hierarchy:

- 1 Use the SVP on the contract header.
- 2 If there is none, use the Model file SVP.
- 3 If there is none, use the Model Group file SVP.
- 4 If there is none, use the company profile SVP.
- 5 If there is none, generate no visits.

Otherwise, the software generates [visits](#) using the first SVP code found when you select the Generate [Visits](#) option on the [Contract](#) Equipment Maintenance Detail window.

No of Service Periods to be Loaded

Enter the maximum number of [service periods](#) for which you generate scheduled maintenance [visits](#). The [scheduled visit profile](#) (SVP) for a [contract](#) lasting for more than a year should include a repeat indicator (*RP); otherwise the software only generates [visits](#) for the first year of the [contract](#).

For example, if you define monthly [service periods](#) and set this field to 24, with an SVP for four [visits](#) a year plus *RP, this generates eight [visits](#). You must run the Load Planned Maintenance [Jobs task](#) to convert these new [visits](#) to actual [jobs](#).

Minimum No of Loaded Service Periods

Use this at period end to limit the extension of scheduled service [visit](#) generation.

When you run the Period End Routines [task](#), you extend the schedule of planned service [visits](#). You also specify a period in the Start Next Profile Load From field on the Scheduled [Visits](#) Maintenance window.

When the Period End Routines [task](#) generates further scheduled [visits](#), these are for the minimum number of periods entered here, ahead of the Start Next Profile Load From date.

You must run the Load Planned Maintenance [Jobs task](#) to convert these new [visits](#) to actual [jobs](#). You can limit planned maintenance [jobs](#) to one machine only, or cover all machines on the [site](#) due for maintenance in the same period.

Renew Service Contracts

Use this checkbox as follows:

Unchecked - Not to renew [service contracts](#)

Checked - To renew [service contracts](#)

One Machine per PM Job

Use this checkbox as follows:

Unchecked - To list all the items due for service in the same period on one [job](#) number

Checked - To generate a separate [job](#) number for each service item, using the Load Planned Maintenance [Jobs task](#)

If you want to allow more than one machine on a [job](#), see the Maintain Codes/Parameters section.

Technical Reporting by Hours or Times

Within the current Equipment Servicing functionality, this must be set to Hours.

Job Category Overwrite at Call Reporting

Use this checkbox as follows:

Unchecked - Not to allow the [job category](#) to be changed by the technician during [timesheet](#) add/amend or during [job](#) completion

Checked - To allow the [job category](#) to be changed by the technician during [timesheet](#) add/amend or during [job](#) completion

Call Centre Active

This feature is not used in this release of the application.

Technicians Diary Active

This feature is not used in this release of the application.

Labour by Rates or Grade

Select one of the following:

Rates - If prices for labour transactions are to be taken from the labour price list entered in the Maintain Labour Price List [task](#)

Grade - If prices for labour transactions are taken from the labour price list entered in Maintain [Cost/Price List task](#)

Distance to be Charged By

Note: You can only check one of the distance checkboxes.

Standard Distance Value

Use this checkbox as follows:

Unchecked - Not to charge for travel by standard distance value

Checked - To charge travel by standard distance value

If you **check** this field, the Charge Standard Mileage Value field in a customer's Additional Service Details will default to **checked**.

Distance Zones

Use this checkbox as follows:

Unchecked - Not to charge distance by zone

Checked - To charge distance by zone

If you **check** this field, the Charge Distance Mileage Zones field in a customer's Additional Service Details will default to **checked**.

Actual Distance Driven

Use this checkbox as follows:

Unchecked - Not to charge travel by distance driven

Checked - To charge travel by distance driven

If you check this field, the Charge Actual Distance field in a customer's Additional Service Details will default to **checked**. You can enter the actual distance driven at [timesheet](#) add/amend.

Press Enter to display the [Company](#) Profile Maintenance Hours window.

Company Profile Maintenance Hours Window

To display this window, press Enter on the [Company](#) Profile Maintenance Planning window.

The service window start and finish times denote the standard working hours per day. The software uses them to ensure that target response dates and times for service [jobs](#) are within working hours.

Fields

Service Window - Start

Enter the time at which your service operations start; that is, when your technicians are available for work. Enter a 24-hour clock time.

When a [call](#) is logged on the system, the software calculates the target time of arrival using the service times you enter here, unless the customer, [contract](#) or machine has its own calendar and shift pattern defined (using the Maintain Working Days Calendar [task](#)).

Service Window - Finish

Enter the time at which your service operations close; that is, when your technicians are no longer available for work. Enter a 24-hour clock time.

When a [call](#) is logged on the system, the software calculates the target time of arrival using the service times you enter here, unless the customer, [contract](#) or machine has its own calendar and shift pattern defined (using the Maintain Working Days Calendar [task](#)).

Note: These service window start and finish times are only effective for day types defined as working days in the Maintain Codes/Parameters [task](#) (under major type DAYT).

Note: You set up the day types against dates in the Maintain Daily Calendar and the Maintain Working Days Calendar [tasks](#).

Display Diary From

You can optionally enter a time from which to display the diary. If you leave this as zeroes, it defaults to the system time.

Reserved Time Buffer

These fields are for future development. They are only displayed if you **checked** the Technicians Diary Active field on the [Company](#) Profile Maintenance Planning window.

Allow Override Shift

Use this checkbox as follows:

Unchecked - If you do not want to use the shift profile function in Service Management

Checked - If you want to use the shift profile function in Service Management

In this case, you can use this to define separate shift profiles for any customer, [contract](#) or machine and you can specify different shift profiles for each working day, if necessary. Once you have **checked** this field and defined an override shift profile, you cannot then set it back to **unchecked**.

Display Reserve Time as Available Time

This field is for future development. It is only displayed if you **checked** the Technicians Diary Active field on the [Company](#) Profile Maintenance Planning window.

Press Enter to display the [Company](#) Profile Maintenance [Job](#) window.

Company Profile Maintenance Job Window

To display this window, press Enter on the [Company](#) Profile Maintenance Hours window.

The fields on this window are mainly to do with the processing of [jobs](#).

Fields

Job Management or Equipment Servicing Mode

Note: This field is not used in this release of the application. Always leave this set to EQ to run in Equipment Servicing mode.

Calculate Warranty

Select one of the following:

[Installation](#) - To calculate the warranty from the [installation](#) date

Purchase - To calculate the warranty from the purchase date

Credit Call Processing

Select one of the following to determine how you handle [calls](#) for a customer on credit stop within [Accounts Receivable](#):

Special status - To set a [call](#) status to 07 automatically

Message only - To display a message during [job](#) creation

Return Status Determination by Technician

This field is not used in this release of the application.

Technician Return Stock Received as Available or Frozen

This field is not used in this release of the application.

Parent/Child Relationship

This field is not used in this release of the application.

Auto Generate EQ Reference Numbers

Automatic generation of reference numbers is used by the Direct Transaction entry function to auto-generate a unique internal document reference number used to link transactions through the application.

Use this checkbox as follows:

Unchecked - Not to generate EQ reference numbers

Checked - To generate EQ reference numbers

Note: Always check this box to enable this function in this release of the application.

Auto Generate Task Numbers

Use this checkbox as follows:

Unchecked - If the system will not generate the [task](#) numbers, so that the user is better able to manipulate the templates

Checked - To ensure that when adding a [task](#) to a template or [job](#) it will not be possible for the user to key in a [task](#) number manually

In this case, the system will generate the [task](#) numbers. This means once a template is created it will not be possible to insert a [task](#) part way through a list of [tasks](#); it would have to be added at the end of the existing [tasks](#) for the [sub-job](#).

Use Order Source

Enter a valid order source value. This will be used by the automatic [Sales Order Processing](#) order creation function when [Sales Order Processing](#) parts orders are placed for a [job](#).

You can use the prompt facility on this field to select from the OMOS Order Source pop-up.

Press Enter to display the [Company](#) Profile Maintenance Interface window.

Company Profile Maintenance Interface Window

To display this window, press Enter on the [Company](#) Profile Maintenance [Job](#) window.

This window holds details of interface parameters.

Fields

Supplier Number = Employee Number

Use this checkbox as follows to establish a link between technicians and supplier number:

Unchecked - If any supplier can be entered on a subcontract [task](#) to be used to generate a purchase order

Checked - If only suppliers with associated technicians can be entered on a subcontract [task](#)

Note: Always check this box to enable this function in this release of the application.

Parts Billed At

Select one of the following:

First time booking - If, as parts transactions are entered, it is possible to view and send them for invoicing via the [Job](#) Completion [task](#)

[Job](#) completion - If parts transactions will not show in the [Job](#) Completion [task](#) until all the [job lines](#) are at status 50 or above

Despatched date - Not available in this release of the application

Margin by Cost or Revenue

The margins as displayed within the [Quotations](#) Maintenance and [Job](#) Completion options are shown as either a [cost](#)-based or revenue-based margin.

Select one of the following:

[Cost](#) - If the margin will be calculated as follows:

[Cost](#) = 120

Revenue = 150

Profit = 30

Therefore margin % will be $30/120 * 100 = 25\%$

Revenue - If the margin will be calculated as follows:

[Cost](#) = 120

Revenue = 150

Profit = 30

Therefore margin % will be $30/150 * 100 = 20\%$

Convert Commitment to Cost at PO Receipt or Invoice Match

Select one of the following:

PO Receipt - If, as purchase orders associated with [jobs](#) are received in Good Receiving they will generate EQ transaction records, which will remove [cost](#) from the commitments on the [job](#) to become an actual [cost](#)

Invoice Match - If the purchase order [costs](#) will remain as a commitment until the purchase order has been matched using the Invoice Matching functions in Purchasing Management

Post Miscellaneous Issues Direct

Use this checkbox as follows:

Unchecked - Not to post [costs](#) for the miscellaneous issues directly and to post them when the Post Inventory Issues [task](#) is run from within Inventory Management

Checked - To post [costs](#) for the miscellaneous issues directly as the issue is completed

Note: *It is recommended that this field should be checked.*

Post Customer Issues Direct

Use this checkbox as follows:

Unchecked - Not to post [costs](#) for the customer issues directly and to post them when the Post Inventory Issues [task](#) is run from within Inventory Management

Checked - To post [costs](#) for the customer issues directly to the [job](#) as the issue is completed by confirmation of despatch

Note: *It is recommended that this field should be checked.*

Default Model Search Option

Select one of the following:

[Model](#) reference - To use the [model](#) reference as the default search option

[Model](#) description - To use the [model](#) description as the default search option

Press Enter to display the [Company](#) Profile Maintenance Response window.

Company Profile Maintenance Response Window

To display this window, press Enter on the [Company](#) Profile Maintenance Interface window.

Fields

Processing by Month or Term

Select one of the following:

Month - To bill the prices entered for a month

[Term](#) - To bill the prices entered for the [term](#) of the [contract](#)

In this case, you cannot use [term](#) pricing for meterage [contracts](#).

Caution: Once you have priced or invoiced a single contract, you cannot alter this parameter.

Allow Service Cover on Pending Contracts

Use this checkbox as follows:

Unchecked - To prevent [calls](#) on a pending [contract](#)

You must change a field on the [contract](#) header before you can send a technician.

Checked - To allow [calls](#) on a pending [contract](#)

If the customer [calls](#) with a problem, you can send a technician, just as if the [contract](#) were active.

Number of Repeat Calls in Sequence = Specialist Call

When the number of repeat [calls](#) for the same machine reaches the number defined here, the software uses the default [job category](#), defined for a specialist [call](#), on the [Call](#) Logging window.

% to Shorten Response on Specialist Call

Enter the percentage by which to reduce a response time, when [call](#) logging recognises a specialist [call](#).

Minimum Number of Calls between Emergency Calls

Enter the number of consecutive [calls](#) a customer must log before you log an emergency [call](#). Use this to prevent customers abusing the emergency service.

This emergency indicator is on the [Call](#) Logging window. When the [job](#) is an emergency, the software sets the target date and time to the system date and time.

Allow New Job at Technical Reporting

This feature is not used in this release of the application.

Check Kits before Assigning Technician

Use this checkbox as follows:

Unchecked - If you make no check for van stock kit

Checked - If when assigning a [job](#) to a technician, Equipment Servicing checks to determine if the kit item number, set up on the [model](#), is present in the technician's stockroom

If it is not present, the software enters a reason code for non-allocation on the [Call](#) Logging window.

Note: *To use this function, you must be using Inventory Management.*

Maximum Customer Importance - Customer Invoice Level

You set up a customer's importance in the Maintain Additional Customer Details [task](#), and the 3-D matrix uses this to help determine response times.

Enter the setting which indicates the most important of your customers. It is advised that you use either 1 or 4.

Press Enter to display the [Company](#) Profile Maintenance Meterage window.

Company Profile Maintenance Meterage Window

To display this window, press Enter on the [Company](#) Profile Maintenance Response window.

Use this window to specify system parameters, including those defining how you handle estimates.

Fields

Estimates Allowed for Billing

Use this checkbox as follows:

Unchecked - To allow only actual readings when pricing meterage [contracts](#)

Checked - To allow estimated readings when pricing meterage [contracts](#)

The software uses this in the [contract](#) header, but you can change it.

Maximum Number of Estimates Allowed to Bill

Enter the default number of estimates allowed, in the [contract](#) header. This is a number in the range 1-999.

The software only uses this field if you **checked** the Estimates Allowed for Billing field.

Estimates Allowed for Reconciliation

Use this checkbox as follows:

Unchecked - To allow only actual meter values in the reconciliation calculation

This is the recommended setting.

Checked - To allow estimates in the reconciliation calculation

Reconciliation is a type of meter billing where there is a review of usage. You can then raise an invoice for a meter count higher than the minimum agreed in the [contract](#) or you can send a credit where the meter count is below the estimate and bill, but greater than the minimum.

Number of Days Prior to Invoice Date to Trigger Estimate

Enter the maximum number of days before the invoice date that the software generates estimated readings.

For example, if you set your invoice date as 31st May and enter 20 here, Equipment Servicing produces estimates on the 11th May, so that customers receive their estimates and can return their own readings.

Number of Days Allowed for Return of Meter Card

Enter the number of days before the invoice date that customers must return their meter cards in order to enter them in time for invoicing.

Actual Reading Validation Parameters

% within Estimate Reading Allowed

Enter a percentage. If a reading falls outside this percentage of the estimate, the software registers the reading as an error.

Multiple of Minimum Copies Allowed

Enter the number by which you can multiply the minimum number of copies allowed. The software uses this value to check for errors in meter readings. The minimum value is the value you assign to the machine in the conditions set up for the [contract](#) line.

Copy Price Conversion Factor (Pence to Pound)

Enter the factor the software uses to convert the copy price back to the main currency unit.

You can set up copy prices in [contract conditions](#) as pence or cents per copy, rather than as decimals of the main currency unit. For example, if you enter 100 here, the software moves the decimal point two points to the left and 0.25 becomes 0.0025.

Item Types to be Invoiced

The following fields cannot be amended once the [company](#) has been created.

Type Code

Enter the four item types to invoice.

Description

Enter the descriptions of the four item types to invoice.

Abbreviation

Enter an abbreviation for the four item types to invoice.

Press Enter to display the [Company](#) Profile Maintenance Assignment window.

Company Profile Maintenance Assignment Window

To display this window, press Enter on the [Company](#) Profile Maintenance Meterage window.

Fields

More Than One Machine Allowed on a Breakdown Call?

Use this checkbox as follows:

Unchecked - If you can only log one machine on a [job](#) number

Checked - If you can log additional machines for the [site](#) on one [job](#) number, after you have updated the [call](#) for the first machine

To allow more than one machine on a planned maintenance [job](#), **check** the One Machine per PM [Job](#) field on the [company](#) profile Maintenance Planning window.

More Than One Breakdown Call Allowed at One Time?

Use this checkbox as follows:

Unchecked - If you can have only one incomplete [job](#) for a machine

Do not use this if you deal with large machines, which might have more than one repair logged.

Checked - If you can log more than one [job](#) for a machine, even if the other [jobs](#) are open or in progress

Position Cursor During Call Logging?

This field is not used in this release of the application.

The cursor will always position at the [job category](#).

Credit Control by Branch?

Use this checkbox as follows:

Unchecked - To display all [jobs](#) for the [company](#) in the Maintain Credit [Calls task](#)

Checked - To display, for [jobs](#) set to bad credit status, only the [jobs](#) for the user's [branch](#) in the Maintain Credit [Calls task](#)

Default Expiry Days for Messages

Enter the default length of time the technician messages remain on the software.

Note: *The software does not use this for machine messages, which take a default date of 99/99/99 (an indefinite expiry date).*

Default Invoice Start Date to First of the Month

Use this checkbox as follows:

Unchecked - To specify that any new [contract](#) you enter assumes an invoice start date the same as the [contract](#) start date

Checked - To specify that any new [contract](#) you enter assumes an invoice start date of the first of the month following the [contract](#) start date

In this case, the software includes any days not invoiced on that invoice. For example, if a [contract](#) starts on 8th August and you send the first invoice on 30th September, it includes the charge for 8th-31st August.

Note: *You can change the invoice start date within the Maintain [Contracts task](#).*

Technical Report Generated if Receptionist Completes Call?

Use this checkbox as follows:

Unchecked - If you do not want a technical report record if the [call](#) receptionist solves the problem over the telephone

Checked - If you want a technical report record if the [call](#) receptionist solves the problem over the telephone

Remote Communications Active?

Use this checkbox as follows:

Unchecked - If your technicians do not use remote communications (for example, hand-held [terminals](#)) to transmit [job](#) details or messages

Checked - If your [company](#) uses remote communications to communicate with your technicians

In this case, when the Service subsystem is active, incoming and outgoing sleeper programs monitor when technicians log on so that the software can transmit [job](#) and message details, or receive the details of technical reports.

Default Re-transmit Flag?

If the Remote Communications Active field is **checked**, select one of the following:

Unchecked - For the software to allow transmission of a [job](#), but not re-transmission of any [call](#) logging changes

Checked - If, whenever a problem is found on an incoming transaction, it will be automatically re-transmitted to the technician

You can overwrite these defaults by selecting **More Details (F21)** on the [Job Line](#) Details window in the [Call](#) Logging [task](#).

Press Enter to display the [Company](#) Profile Maintenance [Calls](#) window.

Company Profile Maintenance Calls Window

To display this window, press Enter on the [Company](#) Profile Maintenance Assignment window.

Use this window to define how you use Automatic [Call](#) Assignment (ACA).

Fields

Automatic Call Assignment Active

Use this checkbox as follows:

Unchecked - If you do not want to use automatic [call](#) assignment

The software does not display the System Parameters Maintenance [Calls](#) window and removes any previous settings on that window. Select **Update (F8)** to update displays on this window.

Checked - If you do want automatic [call](#) assignment available for the [company](#)

The software displays the System Parameters Maintenance [Calls](#) window, so that you can set up the [company's](#) automatic [call](#) assignment parameters.

Note: You can also limit the ACA operation by settings on the [model](#), [job category](#) and [technician](#).

Time within Which Calls are Automatically Assigned

Enter the number of hours before [call](#) target time that Automatic [Call](#) Assignment picks up an unassigned [call](#) and allocates it to a team or preferred technician. This prevents the software from allocating [visits](#) too far in advance.

Assign CM Calls Only to Maintenance-only Technicians

CM is [contracted](#) maintenance; it is neither a [job category](#) nor a [scheduled visit profile](#) code.

Use this checkbox as follows:

Unchecked - To allocate [calls](#) to any technician within the team

Checked - To assign only system-generated [calls](#) (planned [visits](#)) to those technicians assigned to [contract](#) maintenance

Assign Repeat Calls Only to Original Technicians

Use this checkbox as follows:

Unchecked - To assign any [call](#) identified as a repeat [call](#) to any technician within the team

Checked - To assign any [call](#) identified as a repeat [call](#) to the technician who made the original [visit](#)

Assign Calls Only to Preferred Technician for Machine

Use this checkbox as follows:

Unchecked - To assign [calls](#) to any technician within the team

Checked - To assign [calls](#) to the technician defined on the [installation](#), or, if there is none defined, to the team

Assign Calls Only to Technicians Carrying Kit

Use this checkbox as follows:

Unchecked - If the software does not need to check whether the technician is carrying the kit item for the equipment

Checked - For the software to check the technician's van stock (defined for that technician) in order to ensure that the technician is carrying the kit item for the equipment

Permitted % Increase in Response Time

Enter the percentage by which [calls](#) can exceed their target time and still be scheduled by Automatic [Call](#) Assignment.

Above this figure, ACA does not allocate the [call](#) and adds the appropriate reason code (parameter type ETAR) to the [job](#).

Permitted Appointed Call Overlap Time (Minutes)

Enter the amount of time, in minutes, by which appointments can overlap.

Technician Workload Threshold (Hours)

This field is not used in the current system.

Automatic Call Assignment Sleeper Wait Time (Minutes)

Enter the number of minutes the ACA procedure (which runs in the background) should wait before it runs again.

Maximum Calls to Assign between Waits

Enter the maximum number of [calls](#) that ACA should attempt to schedule for a technician each time it runs. Use this field to avoid overloading a technician.

Press Enter to display the [Company](#) Profile Maintenance Accounts window.

Company Profile Maintenance Accounts Window

To display this window, press Enter on the [Company](#) Profile Maintenance [Calls](#) window.

Field

General Ledger Account Codes

Sales Ledger Control

Only use this field if you are not using [AFI](#). Enter the [General Ledger](#) debtors control account used for posting sales revenue.

You can use the prompt facility on this field to select from the Select Account pop-up.

VAT Control

Only use this field if you are not using [AFI](#). Enter the [General Ledger](#) VAT output account used for posting sales revenue.

You can use the prompt facility on this field to select from the Select Account pop-up.

Service Sales

Only use this field if you are not using [AFI](#). Enter the [General Ledger](#) sales account used for posting sales revenue.

You can use the prompt facility on this field to select from the Select Account pop-up.

Deferred Income

Only use this field if you are not using [AFI](#). Enter the [General Ledger](#) account for posting deferred revenue from [service contracts](#) invoiced in advance.

You can use the prompt facility on this field to select from the Select Account pop-up.

Press Enter. If you have specified control accounts, and use extension codes, an Extension Code pop-up is displayed for each account. Select the correct extension codes. Press Enter on each Extension Code pop-up to complete the [company](#) profile maintenance and save all changes.

Select **Exit (F3)** to leave the [task](#).

Maintain Codes/Parameters [2/EQP, 3/EQU]

There are two versions of this [task](#) for setting up the many codes that are used throughout the software for data entry, validation and analysis:

- The first is one of the EQ [Company](#) Parameters [tasks](#).
- The second is one of the EQ System Utilities [tasks](#).

The two [tasks](#) lead into exactly the same windows and you use them in the same way. The difference between them is that the system utilities [task](#) displays, and allows you to maintain, the

system-supplied parameters. These are supplied with Equipment Servicing when it is installed and they are essential to its operation.

You can identify system-supplied parameter types by the asterisk (*) in the first position of the parameter type description.

You are strongly advised not to amend or delete system-supplied parameter types, their descriptions or their parameter IDs. You can amend the parameter ID descriptions if the amendment is advised or approved by your software support organisation.

Caution: You should only use this task in special circumstances, and then only under the guidance of an experienced technical adviser on Equipment Servicing. The corruption of reserved codes would cause severe problems. For this reason, access to the task must be restricted to the most senior person(s) responsible for data integrity.

Note: You must have exclusive use of *Equipment Servicing* to do this.

You can change a user code into a system-supplied code by adding an asterisk (*) to the beginning of the description. It will then only appear in the system utilities version of the [task](#).

List of Parameter Types

There are two types of codes: reserved codes, required by the software, and codes you can use and define. You can create additional parameters to control processing. For example, the Field to be Mandatory field is specific to parameter type VLDN and determines whether you must enter the technician and the fault code when you log a [call](#).

The parameter types available and where you use them are as follows:

ABSC

Technician Absent Codes

Code ID - one character

You must have **1** (Logged on) and **0** (Logged off). You can define other reasons for a technician's absence, for example, holiday or sickness.

ACTY

[Activity](#) Codes

Code ID - two numeric characters

You can define activities that can be attached to a staged payment schedule for a [job](#).

AWCD

Allowance Code

Code ID - two numeric characters

You can define allowances that can be attached to technician time sheets. This field is memo only on the [timesheet](#) function.

BUDF

[Budget](#) Forecast Code

Code ID - two numeric characters

You can define codes that will allow you to define different forecasts at the same [job](#) level for comparison.

BUDC

[Budget](#) Code

Code ID - two numeric characters

You can define codes that will allow you to define different [budgets](#) at the same [job](#) level for comparison.

CCAL

Customer Calendar Codes

Code ID - two characters

You can define alternative calendars that will be used by Equipment Servicing when calculating target date and times for [jobs](#). The [company](#) default calendar has a blank calendar code. If you create additional calendars, these can then be attached to customer, equipment or [contracts](#).

CCRC

[Contract](#) Cancellation Reason

Code ID - one character

You can define the reasons for cancelling a [contract](#), for example, too expensive.

CHST

* [Contract](#) Header Status

Code ID - one character

This defines the possible status of a [contract](#) header, for example, [quotation](#), active.

CLMT

Warranty Claim Type

Code ID - one character

This defines the warranty type, for example, labour, parts.

CLST

[Contract](#) Line Status

Code ID - one character

This defines the status of a [contract](#) line, for example, active, expired.

CODC

Condition Code (Accessories)

Code ID - one character

This defines the condition code for accessories. You should only use this on the accessory.

COLM

Collection Method

Code ID - two characters

This field is used by the system to define the way in which the equipment is to be transported to the workshop.

01 - Customer to transport equipment

02 - Workshop to collect equipment

These values should not be deleted.

CORA

[Model](#) Reporting Level 4

Code ID - three characters

You can define the codes that can be attached to the fourth level of the [model](#)/reporting hierarchy.

COST

[Cost](#) to Complete Code

Code ID - two characters

If you want to include a [job](#) in the [cost](#) to complete process, you must define a [cost](#) to complete code against it. This [job](#) is then included in the Initiate [Cost](#) to Complete [task's](#) batch [job](#).

If you have a large number of [jobs](#) to process in the Initiate [Cost](#) to Complete [task](#), this batch [job](#) could be a big [job](#). To split the processing into two, three or more batches, set up two, three or more [cost](#) to complete codes, and assign different ones to different [jobs](#). You can then process only those [jobs](#) of a certain code.

CRDR

Credit Assessment Reason Code

Code ID - two characters

This defines the credit assessment, for example, credit not available, credit required. These are used by the system and should not be deleted.

CREA

[Call](#) Cancellation Reason

Code ID - two characters

You can define codes to identify reasons why you can cancel a logged [call](#), for example, customer cancelled, not covered by [contract](#).

CRTY

Credit Type

Code ID - one character

This defines the credit type, for example, credit not applicable, credit required.

CSHF

Shift Profile Code

Code ID - two characters

Use this to define different types of shift profile codes. These can be attached to working day type to identify the shifts working on that type of day. The code is then included in the target date and time calculation.

DAYS

*Day Name

Code ID - three characters

This defines a short description for days. It is used in the time allocation function.

DAYT

*Day Type

Code ID - one character

This defines the type of day, for example, working, non-working or bank holiday.

This is an important parameter when dates and times are being calculated. An additional flag on the parameter indicates whether the day type is a working or a non-working day. Non-working days are not included in date calculations.

There is also a deferred revenue check box. If this box is **checked**, [contract](#) revenue for a given [invoice period](#) will be divided up and deferred over the number of deferral days in the [invoice period](#).

DEFC

Defect Code

Code ID - one character

This defines the problem found with parts that have to be replaced during a repair, for example, loose wire, broken PCB.

DESM

Despatch Methods

Code ID - one character

This defines how you return the equipment to the customer, for example, courier, customer collected.

DFLT

*** Equipment Servicing Defaults**

Code ID - four character

This defines various defaults used by the Equipment Servicing Application

SPRD

Spread AP transactions in EQ

This code needs to be activated to allow transactions to be spread over multiple periods.

DFDM

Default Despatch Methods

Code ID - one character

This defines the default despatch method, for example, courier.

DISC

Discount Reasons

Code ID - one character

This defines the reasons for a discount, for example, major account, no discount.

EDAY

Elapsed Days

Code ID - four characters

This defines elapsed days for a document before the system recommends follow up action, for example, warranty claim returns, letter or quote chasing days.

EGRD

Technician [Job](#) Grades

Code ID - two characters

This defines the technician grades, for example, senior technician, field technician. Technician grades can then, if required, be used to attach different [cost](#) and labour price lists to a [job](#). This field is used in the **Maintain Technician [task](#) [1/EQM]**.

EQST

Equipment Status

Code ID - one character

This defines the status of the equipment. This status is user-definable and is usually used to indicate loan, customer or demo equipment at the customer [site](#) using the **Maintain [Installation Details task](#) [3/EQE]**.

ETAR

*Engr Assignment Error Codes

Code ID - two characters

This defines the error codes for automatic [call](#) assignment and the Resource Planner Board, for example, ACA not allowed for [company](#), unable to place [call](#) in queue.

FLTC

Faults

Code ID - three characters

This defines the codes that can be attached to the first level of the reporting hierarchy using the Maintain Reporting Hierarchy [task](#).

GLPR

Global Price Increase Code

Code ID - two character

This defines the groups that could be used to implement a [contract](#) price increase, for example, dealer groups code, no price increase.

GLT

*GL Deferred Revenue Transaction Text

Code ID - one character

This defines the text transferred to [General Ledger](#) with the [contract](#) deferred revenue, for example, [service contract](#) number, service deferral.

GTXT

*General System Text

This is used in [contract](#) maintenance to change the description of the F22 function depending on the status of the [contract](#):

AC - **Accept [Contract](#) (F22)**

QU - **[Quotation](#) Only (F22)**

IBG1

India [Branch](#) Group 1

Code ID – 3 characters

This code is required for additional functions and reporting in India.

IBG2

India [Branch](#) Group 2

Code ID – 3 characters

This code is required for additional functions and reporting in India

IBG3

India [Branch](#) Group 3

Code ID – 3 characters

This code is required for additional functions and reporting in India

INVT

Settlement Discount Invoice Type

Code ID - one character

This defines the type of invoice appropriate for settlement discount, for example, [job](#) invoice, [contract](#) invoice.

JHST

*[Job](#) Header Status

Code ID - one character

This defines the status of the [job](#) header, for example, open, cancelled.

JLAB

*[Job Line](#) Abbreviated Status

Code ID - two characters

This defines the abbreviations for the [job line](#) status, for example, OPN, SCH, [WIP](#). This 3-letter abbreviation is visible in the **Work Control [task](#) [3/EQS]**.

JLST

*[Job Line](#) Status

Code ID - two characters

This defines the [job line](#) statuses, for example, 01 (Customer to Send Equipment), 20 (Open), 50 (Complete) etc.

There are additional control flags associated with this value:

Escalation Active

If this flag is **1**, this status will be included in the Escalation Reporting system if you use it.

Whole [Job](#) Status

If this field is blank, the status can be applied at individual line level. For example Assignment (22) and Scheduling (24) are usually applied at line level.

If the field is not blank, this status can only apply to the whole [job](#). For example Customer to Send (01) and Factory Claim Required (86) apply to the whole [job](#).

MROV

Reason for Override

Code ID - two characters

This defines the reason for a meter reading override, for example, meter change, previous actual incorrect.

MRSR

Meter Reading Source

Code ID - one character

This defines the methods used for getting the meter reading, for example, customer reading, technician reading.

MTHS

*Months Descriptions

Code ID - three characters

This defines the monthly descriptions used in various windows.

OPER

Physical Condition Code

Code ID - two characters

This defines the physical condition of the equipment, for example, scratched. It is input-capable during equipment booking for workshop [jobs](#).

OWNP

Warranty Claim [Ownership](#) Code

Code ID - one character

This defines the warranty claim [ownership](#), for example, end customer. This is used during warranty claim creation.

PAYT

Payment [Terms](#)

Code ID - one character

This defines the payment [terms](#): for example, Payment Method No. 1. This function is not used in this release of the application.

PTCH

Geocode/Territory/Patch Description

Code ID - three characters

This defines the Geocode/Territory/Patch, for example, all territories for team *DF. This field is used in the Maintain FSG/Territory/Team [task](#).

REAS

Req Date Change Reason Code

Code ID - two characters

This defines the date change reason, for example, Date Input Mistake. This is primarily used by the fixed asset processing.

RECT

*Invoice Line Type

Code ID - two characters

This defines the type of lines being processed through [job](#) completion, pending invoice maintenance, invoicing and invoice enquiry, for example, fixed labour hours, parts.

REC2

*Invoice Line Type Short Description

Code ID - two characters

This defines the abbreviations for the invoice line types defined by parameter RECT: for example, FXD LBR, LBR HRS.

REGN

Regions

Code ID - two characters

This defines the regions for the workshop [branch](#), for example, Central, Southern. Other [tasks](#) that can have regions entered are Maintain Technician, Maintain [Contracts](#) and Maintain Additional Customer Details.

REPC

Repair Code

Code ID - one character

This defines the repair codes for parts used on a [job](#), for example, Replacement, Cleaned. These codes are normally entered in conjunction with a defect code.

RJCD

Warranty Claims Reject Code

Code ID - one character

This defines the reject reasons for warranty claims, for example, Invalid Account, Invalid [Location](#). At any point in the life of a claim it can be re validated and any faults found with the claim recorded as a series of reject codes.

Each code has additional flags associated with it that control whether the reject code can be manually overridden during warranty claim management.

RRES

Credit Release Reason

Code ID - one character

This defines the reasons for releasing the credit, for example, Payment Agreed, Life -threatening Problem. This code is mandatory when you are using the Maintain Credit [Calls task](#).

RVTY

Default Return [Visits](#)

Code ID - two characters

This defines the reason for return [visits](#). These codes can be recorded in the [timesheet](#) system. Examples of reason for return are: parts required, [job](#) not complete, customer [terminated visit](#).

SECT

Customer Description

Code ID - three characters

This defines the codes that can be attached to the second level of the reporting hierarchy using the **Maintain Reporting Hierarchy [2/EQM] task**.

SJBN

Sub [Job](#) Codes

Code ID - three characters

If any values are set up, these will be the only codes allowed to be entered in a template structure and in [job](#) structure. If you do not set up any codes, you can enter any code when creating structures.

SRVC

*Special Revenue Categories

*SC - Sundry Credits

*SI - Sundry Invoices

SSCT

Customer Description

Code ID - three characters

This defines the codes that can be attached to the third level of the reporting hierarchy using the Maintain Reporting Hierarchy [task](#).

STA1

Statistical Family ([Models](#))

Code ID - three characters

This defines the statistical groups for the [models](#), for example, Imperial Measurement, Metric Measurement. If required, this code is attached via the **Maintain Model task [2/EQE]**. This can be used as a further non-hierarchical definition of the [model](#) (in addition to [division](#), [model](#) group, and [model](#) sub group).

S2SE

*Serious Error Codes

The only one defined is **01** (End of Calendar File Reached). This is printed out on the Serious Error report which can be run from the Report by Serious Errors [task](#).

TEAM

Team Description

Code ID - three characters

This defines the technician teams. Usually a technician is defined as being part of a team. The Maintain FSG/Territory/Team [task](#) associates team and technicians with [model](#) and customer attributes so that a team, and possibly a technician, can be retrieved as the [job](#) is being created.

TEMT

Template Type

Code ID - 1 character

This allows you to set up template type that can be used to differentiate between local and global templates.

TPER

[Timesheet](#) Period Days

Code ID - 2 characters (always **01**)

This allows you to set up a number of days to allow [timesheets](#) and expenses to be entered where their transaction date is within this number of days previous to the current period.

TRFM

*[Transfer Method](#)

Code ID - 1 character

This indicates the way in which the [job](#) will post to the [General Ledger](#)

0 P&L

1 [WIP](#) - Month End

2 [WIP](#) - Release

3 [WIP](#) - Close & Rel

8 Hold

For a fuller description, see the [AFI](#) chapter of this product guide.

TSKN

[Task](#) Codes

Code ID - three-digit numeric

If any values are set up, these will be the only codes allowed to be entered in a template structure and in a [job](#) structure. If no codes are set up, you can enter any code when creating structures.

TXTI

Standard Document Text

Code ID - two characters

This defines the text for standard documents, for example, Advice Note, Acknowledgement. Each text type will have a standard document template available for maintenance using the Maintain Standard Text [task](#).

These templates are then used throughout the system. For example, [quotations](#) are printed from the [quotation](#) module, acknowledgements are printed from [call](#) logging, etc.

TXTO

Text Destination Codes

Code ID - three characters

This defines the people to whom you can send text, for example, Sales [Manager](#), Operator. The text here is entered via the Maintain Standard Text [task](#) function. If text is entered with a destination and date, it will be printed out by the day end program on that date.

TYDS

*Billing Type Description

Code ID - two characters

This defines the type of billing allowed: for example, Fixed Service, Rental. This is displayed on the Billing Maintenance pop up used in [contract](#) header maintenance and will be printed on the [contract](#) invoice.

VSTP

[Scheduled Visit Profiles](#)

Code ID - three characters

This defines the quantity of [visits](#) produced using the [scheduled visit profile](#): for example, fortnightly, and monthly. The 3-character code should reflect the frequency of the [visits](#). Once a code is created, a schedule of [visits](#) can be associated with it.

WAIT

Wait Times for Sleeper [Jobs](#).

Code ID - one character

This defines the delay time for specific [jobs](#), such as Incoming Transaction Monitor used in remote communications.

WCLC

Warranty Claim Labour Credit

Code ID - three characters

This defines the warranty claim labour credit code. A number of code types can be set up and have [model](#), fixed rates and hourly rates associated with them using the Maintain Warranty Claim Labour Credit Note [task](#).

Each dealer eligible for payment must have a Warranty Claim Labour credit code associated with them using the Maintain Additional Customer Details [task](#) if you wish to compensate them for labour.

WRFL

Warranty Claim Flag

Code ID - one character

This defines the types of warranty claim allowed, for example, warranty parts claim allowed or labour and parts or labour only.

WVAL

Warranty Claim Value Limit

Code ID - PCVL

This allows you to define an upper limit for the value of a part listed on a warranty claim. If the parts value is greater than this value, the part will be requested from the dealer before a credit note is issued.

XTYP

*Text Types

Code ID - two characters

This defines the type of text allowed, for example, [job](#) story text, invoice text equipment text, etc.

ZONE

Zone Charge Description

Code ID - one character

This defines the codes for the mileage zones, for example, inner city, suburbs. If a customer is to be charged for mileage, it can be based on actual mileage driven, standard mileage from the nearest service [branch](#) or zones, where a zone code is associated with a charge and a customer.

240E

*[Job](#) History Enquiry Options

Code ID - two character

This defines the current available list of options that can be used in the Enquire on [Job](#) History [task](#).

240P

*Work Control Function List

Code ID - two characters

This defines the current available list of options that can be used in the **Work Control** [task](#) [3/EQS].

320P

*Warranty Claim Function List

Code ID - two characters

This defines the current available list of options that can be used in the **Work Control** [task](#) [3/EQS].

Codes/Parameter Maintenance Selection Window

To display this window, select the Maintain Codes/Parameters [task](#).

There are two categories of parameters in Equipment Servicing, those that are set up in advance and are installed with the software (system-defined parameters) and those that you set up (user-defined parameters).

System-defined parameters have a description that starts with an asterisk (*).

Any parameter, whether system-defined or user-defined, consists of:

- The parameter type (that is, the four-character code itself)
- Any number of parameter IDs, which are the codes that exist within that parameter type

Note: *The parameter type corresponds to the major type parameter in other modules, and the parameter ID to the minor type.*

There are two main functions you can perform from this window:

- You can amend an existing parameter type or add a new one. To do this, enter PTDS in the Parameter Type field and the new or existing parameter type in the Parameter ID field.
- You can amend an existing parameter ID/code or add a new one.
- Select the required parameter type. The Parameter Code Selection window will be displayed, where you can select the parameter ID/code you require, or enter a new parameter ID/code.
- Enter the parameter type you require in the Parameter Type field and the parameter ID (new or existing) in the Parameter ID field and then press Enter. The Codes/Parameter Maintenance window is displayed for IDs.
- Enter the parameter type you require in the Parameter Type field and use the prompt facility. The Parameter Code Selection window is displayed, on which you can select the parameter ID/code you require or enter a new parameter ID/code.

Fields

Parameter Type

If you want to create a new parameter type or amend an existing one, enter PTDS in this field, enter the code of the parameter type in the Parameter ID field and then press Enter.

If you want to create a new parameter ID, or maintain an existing one, for a parameter type that already exists, enter the relevant parameter type in this field, enter the parameter ID in the Parameter ID field and then press Enter.

Parameter ID

If you want to create a new parameter type or amend an existing one, enter PTDS in the Parameter Type field, enter the code of the parameter type in this field and then press Enter.

If you want to create a new parameter ID, or maintain an existing one, for a parameter type that already exists, enter the relevant parameter type in the Parameter Type field, enter the parameter ID in this field and then press Enter.

Options

Select

Use this to select a parameter type and display the existing parameter IDs that are set up for it.

Caution: Do not amend or delete any of the supplied parameter types unless advised to do so; you may get unpredictable results.

Enter PTDS in the Parameter Type field and the code of a parameter type in the Parameter ID field and then press Enter to display the Codes/Parameter Maintenance Window for Types.

Enter a parameter type in the Parameter Type field and a parameter ID in the Parameter ID field and then press Enter to display the Codes/Parameter Maintenance Window for IDs.

Select a parameter type to display the Parameter Code Selection window.

Codes/Parameter Maintenance Window for Types

To display this window, enter PTDS in the Parameter Type field and the code of a parameter type in the Parameter ID field and then press Enter on the Codes/Parameter Selection window.

Use this window to set up or maintain a parameter type. If users will need to set flags against the parameter type, set them up using the Character 1, 2 and 3 Req fields.

Fields

Description (Maximum) Size

Enter a value between 1 and 30 to define the length of the description of the parameter IDs for this parameter type.

I.D. Size

Enter a value between 1 and 4 to define the length of the parameter IDs for this parameter type.

Format

Select one of the following:

Character (C) - To create character-based parameter IDs

Numeric (N) - To create numeric-based parameter IDs

Description

Enter a parameter type description of up to 30 characters.

As a security measure, any description with the character * can only be maintained from the system utilities version of this [task](#).

Value Required

Use this checkbox as follows:

Unchecked - If parameter IDs for this type do not require a value

Checked - If you must enter a value (either an absolute value or a percentage) when maintaining parameter IDs of this parameter type

Value Description

If you **checked** the Value Required field, any text entered in this field will be displayed on the Parameter ID Maintenance window next to the field where the value has to be entered.

Value Type Description

If you **checked** the Value Required field, any text entered in this field will be displayed on the Parameter ID Maintenance window next to the one-character field where **P** (Percentage) or **V** (value) can be entered.

Character 1 Req

Use this checkbox as follows:

Unchecked - If no field is required

Checked - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under system-maintained parameter type PMC1.

Description (Character 1)

If you **checked** the Character 1 Req field, this description will be used to explain the way in which the character flag will be used.

The entry is held under system-maintained parameter type PMC1.

Character 2 Req

Use this checkbox as follows:

Unchecked - If no field is required

Checked - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under system-maintained parameter type PMC2.

Description (Character 2)

If you **checked** the Character 2 Req field, this description will be used to explain the way in which the character flag will be used.

The entry is held under system-maintained parameter type PMC2.

Character 3 Req

Use this checkbox as follows:

Unchecked - If no field is required

Checked - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under system-maintained parameter type PMC3.

Description (Character 3)

If you **checked** the Character 3 Req field, this description will be used to explain the way in which the character flag will be used.

The entry is held under system-maintained parameter type PMC3.

Allow Blanks

This field is only displayed when you are using the system utilities version of this [task](#).

Use this checkbox as follows:

Unchecked - To force the entry of 1 or 0 in the Character 1 or Character 2 fields when maintaining the parameter IDs

Checked - To allow blank entries in the Character 1 or Character 2 fields when maintaining the parameter IDs

Note: *The rule does not apply to entries or blanks in the (2-character) Character 3 field.*

Caution: Do not amend or delete any of the supplied parameter type definitions unless you are specifically advised to do so by your agent, as unpredictable results may occur.

Press Enter to save the changes and re-display the Codes/Parameter Maintenance Selection window.

Parameter Code Selection Window

To display this window, select a parameter type on the Codes/Parameter Maintenance Selection window.

Use this window to set up or amend parameter IDs. The window lists all parameter IDs already set up for the selected parameter type.

Note: *You should not create more than 10 parameter IDs for parameter type DAYT. This is the only parameter with a limit of this kind.*

Note: *If you set up more than 10, [call](#) logging ignores any value from the 11th code. As the Working Days code is often W, and therefore at the end of the list of codes, the software ignores this code, which leads to unpredictable results.*

Select a parameter ID to display the Codes/Parameter Maintenance Window for IDs.

Codes/Parameter Maintenance Window for IDs

To display this window, enter a parameter type in the Parameter Type field and a parameter ID in the Parameter ID field and then press Enter on the Codes/Parameter Maintenance Selection window.

Alternatively, select a parameter ID on the Parameter Code Selection window.

Use this window to set up or amend the description for a parameter ID.

If this parameter type has additional fields set up for it (using the Character Required fields on the Codes/Parameter Maintenance Window for Types), they are displayed here.

Fields

Description

Enter the parameter ID description. The maximum length of this field is specified in the Description Maximum Size field on the Codes/Parameter Maintenance window for Types.

Value or Percentage Code

This field is only displayed if it was selected on the parameter type.

Enter one of the following:

P - Percentage

V - Value

Actual Percentage or Value Figures

Enter the required value, either a percentage or absolute value.

Value Field(s)

These fields are only displayed if you specified extra values and characters for the parameter type on the Codes/Parameter Maintenance Window for Types, using the Character Required fields.

Enter the required value or values. The software stores these under system-generated parameter types PMC1, PMC2 or PMC3, according to the setting of the Character Required fields 1, 2 and 3.

Press Enter to save your changes.

Maintain Calendar Control [3/EQP]

Use this [task](#) to define the number of [service periods](#) per year and set the current period and year when you set up the system.

Note: You must have exclusive use of the [company](#) to run this [task](#).

A [service period](#) is a specific number of days, defined by a start and end date.

You can enter between 1 and 99 [service periods](#) per calendar year, but typically they are a week, 4 weeks, or a month long.

Note: You must set up the current [service period](#) and year when you install Equipment Servicing. Thereafter, when you run the Period End Routines [task](#), it automatically increments the period (and year, when necessary).

Calendar Control Maintenance Window

To display this window, select the Maintain Calendar Control [task](#).

Use this window to define the basic details for the current year.

Fields

Note: Once set up, these fields are system-maintained.

Current Year

Enter the current year, in the range 00 to 99.

Current Week

Enter the week number, in the range 01 to 53.

Current Period

Enter the current period number, in the range 01 to 99.

No. of Weeks This Year

Enter the number of weeks. This must be either 52 or 53.

No. of Weeks Last Year

Enter the number of weeks in the previous year. This must be either 52 or 53.

No. of Periods This Year

Enter the number of periods in this (current) year, in the range 01 to 99.

Press Enter to save the changes and leave the [task](#).

Maintain Daily Calendar [4/EQP]

Use this [task](#) to define and maintain a calendar of service and payroll periods. You use this [task](#) when you install Equipment Servicing, to define the calendar for current, previous and future years.

Note: You must create an extra dummy year, one year prior to the first year actually required. This is so that you can define service or payroll years, or both, which span two calendar years. The Maintain Rebuild of Period End Dates [task](#) does not create period end date records for the first year defined in the Daily Calendar file.

Use this [task](#) after [installation](#) to define all future years.

Make sure that you set up the calendar far enough into the future, so that you can generate scheduled [visits](#).

Note: You must have exclusive use of the [company](#) to do this.

Implications

Equipment Servicing uses [service periods](#) to control the scheduling of planned maintenance [jobs](#) and to monitor all [jobs](#) processed.

Equipment Servicing uses payroll periods to control the postings to [Accounts Receivable](#) and the [General Ledger](#), from [job](#) and [contract](#) invoicing. This is particularly in relation to apportioning deferred revenue from [contract](#) invoices.

Note: The calendar file data is essential; without it, you cannot create [contracts](#), process [jobs](#) or raise invoices.

After making changes, you must run the Maintain Rebuild of Period End Dates [task](#). This makes sure that the period end dates on the system accurately reflect the daily calendar detail. You should check the period dates after the rebuild, using the Enquire on Period End Dates [task](#).

Daily Calendar Maintenance Window

To display this window, select the Maintain Daily Calendar [task](#).

Use this window to specify the calendar you want to maintain or create.

Fields

Year

Enter the year to add or update.

Press Enter to display the Period End Dates window.

Period End Dates Window

To display this window, enter a year and then press Enter on the Daily Calendar Maintenance window.

Use this window, for each month, to classify the day type for each day. Examples of day types are bank holiday, Saturday, weekend or working day. You define the day types in the Codes/Parameters file under parameter type DAYT.

Fields

1st Service Period - End Date

Enter or select the date of the first [service period](#) end.

1st Payroll Period - End Date

Enter or select the date of the first payroll period end.

Day Type

Enter a day type against each day of the month. The day types define working days and non-working days.

You can use the prompt facility on these fields to select from the Day Type pop-up.

Service Pd

Enter **E** under the last day of a [service period](#). You can have more than one [service period](#) end in a calendar month.

You must enter an **E** for the date specified in the 1st [Service Period](#) - End Date field.

Payroll Pd

Enter **E** under the date which is the last day of a payroll period. You can set more than one payroll period end in a calendar month.

You must enter an **E** for the date specified in the 1st Payroll Period - End Date field.

Note: The [service period](#) and the [accounting period](#) end dates can be in a previous calendar year. You must enter a dummy year, for the year before the first calendar year you require, and enter **E** in the Service Pd and Payroll Pd fields.

Note: To see the different months, use Page Up and Page Down.

When you have entered all months, select **Update (F8)** to update.

Note: After making changes you must run the Maintain Rebuild of Period End Dates [task](#). This makes sure that the period end dates on the system accurately reflect the daily calendar detail. You should check the period dates after the rebuild, using the Enquire on Period End Dates [task](#).

Maintain Branch [5/EQP]

Use this [task](#) to set up each workshop [branch](#) operating within a [company](#). You use this [task](#) when you are setting up your system to define all [branches](#), and as necessary to add new [branches](#).

Note: You must have exclusive use of the [company](#) to do this.

A [branch](#) is a sub-[division](#) of a [company](#), and is an organisational unit that controls its own service operations, but shares certain data with other [branches](#).

You must define at least one [branch](#) for each [company](#) in order to use Equipment Servicing. You must also authorise at least one user to a [branch](#) before you can access the [branch](#).

When using the software, you are always signed on to a particular [branch](#). You can authorise yourself to access one or more [branches](#). If you have access to more than one [branch](#), you can switch between them within the same session. The [branch](#) to which you sign on determines the data you can access and the [ownership](#) of the data you create.

Note: If India functionality is active (GL parameter 070), India details must be entered; additionally, both the [branch](#) and [branch](#) stockroom must have the same state

Branch Maintenance Selection Window

To display this window, select the Maintain [Branch task](#).

Use this window to select the [branch](#) you want to maintain or define.

Fields

Branch Code

Enter a new [branch](#) code using up to two alphanumeric characters.

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Select a [branch](#) or enter a [branch](#) code and then press Enter to display the [Branch](#) Maintenance Detail window.

Note: When India function is active the both the [branch](#) and [branch](#) stockroom state must be the same.

Branch Maintenance Detail Window

To display this window, select a [branch](#) or enter a [branch](#) code and then press Enter on the [Branch Maintenance Selection](#) window.

Use this window to specify the [branch](#) workshop details.

Fields

Branch Name

Enter the name of the [branch](#), using up to 35 alphanumeric characters.

Address

Enter the [branch](#) address.

Post Code

Enter the [branch](#) postcode, using the official postcode format.

Telephone

Enter the [branch](#) telephone number. You can use up to 15 alphanumeric characters.

Time Zone

You can optionally enter the time zone for the [branch](#).

Alternatively, use the prompt facility to select from the TIMZ Time Zones pop-up.

Distance Travel Rate

Enter the travel rate. This is the default [cost](#) per mile/km travelled. The software uses the Charge per Mile/Km field in the customer's additional service details to calculate revenue.

Average Travel Time

Enter the default travel time, in hh:mm format, for use in [call](#) scheduling calculations.

Calendar Code

This is a memo only field. Leave this field blank to use the standard system calendar.

You can use the prompt facility on this field to select from the Customer Calendar Code pop-up.

Labour Cost List

Enter the default labour [cost](#) list for the [branch](#). If this is not entered, the labour [cost](#) list will default to the one in the [company](#) profile.

You can use the prompt facility on this field to select from the Select [Cost](#) List pop-up.

Default Exchange Stockroom

Enter the default exchange stockroom for this [branch](#). When Service Exchange items or Credit Assessment items are refurbished, this will be the stockroom into which they will be received. You can set this to be the same as the [branch](#) stockroom.

You can use the prompt facility on this field to select from the Stockroom Selection pop-up.

Branch Stockroom

Enter the default stockroom for this [branch](#). This is the stockroom used when you receive or transfer stock. Therefore, all parts ordered for a workshop [job](#) will be despatched to this stockroom. You can set this to be the same as the default exchange stockroom.

You can use the prompt facility on this field to select from the Stockroom Selection pop-up.

Note: when India function is active the [branch](#) and [branch](#) stockroom state must be the same.

Default Transfer to Stockroom

Enter the default stockroom to which you transfer all despatches from the workshop.

You can use the prompt facility on this field to select from the Stockroom Selection pop-up.

Labour Price List

Enter the default labour price list for the [branch](#). If this is not entered, the labour price list will default to the one in the [company](#) profile.

You can use the prompt facility on this field to select from the Price List Selection pop-up.

Job Audit Log Queue

Enter the output queue to which to direct the [Job](#) Audit Log report. This audit lists [job](#) maintenance [tasks](#). If you leave this field blank, the software uses the queue specified in Application [Manager](#).

Default Account Number

Enter the account number to use when transferring items to stock.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Default Site Number

Enter the [site](#) number to use when transferring items to stock.

Default Collection Method

Enter the default collection method for this [branch](#).

Alternatively, use the prompt facility to select from the Collection Method pop-up.

Functions

Location Maint. (F14)

Use this to maintain all [location](#) codes. The [Location](#) Code Maintenance window is displayed.

Reference numbers (F15)

Use this to display the Reference Number Entry Window

Select **Update (F8)** to save any changes you have made.

Location Code Maintenance Window

To display this window, select **Location Maint. (F14)** on the [Branch](#) Maintenance Details window.

Use this window to specify all the valid [locations](#) for the selected workshop.

Fields

Location

Enter all the [locations](#) that this [branch](#) can use.

Select **Update (F8)** to save the details and return to the previous window.

Reference Number Entry Window

To display this window, select **Reference Numbers (F15)** on the [Branch](#) Maintenance Details window.

Use this function to set up reference numbers for use in retrieving Invoice and Credit Note numbers for a [Branch](#).

If no reference numbers are set up then the [Company](#) level Invoice and Credit note numbers will be used.

Note: *It is possible for the Document types and Reference codes to be set up so that multiple [branches](#) can point to the same reference code and hence, share Invoice and Credit note numbers. For India, this means all [branches](#) in the same 'state' can share Invoice and Credit note number ranges.*

Fields

Reference Type

This field displays types held on the Inventory Descriptions file. These types are system-maintained.

Reference Code

Enter the range to be defined for a reference type.

Alternatively, use the prompt facility to select from the RFCD Reference Code pop-up.

Last Number Used

This displays the last number generated for each reference type and is system-maintained.

Select **Update (F8)** to save the details and return to the previous window.

Indian Details Maintenance Window

India only

To display this pop-up, press **Update (F8)** on the [Branch](#) Maintenance Detail Window.

Fields

PAN Number

Enter a Pan Number if required.

GSTIN

Enter a GSTIN for the [branch](#).

Branch Group 1

Enter a [Branch](#) Group 1

Alternatively, use the prompt facility to select from the GL description IBG1 India [Branch](#) Group 1 pop-up.

Branch Group 2

Enter a [Branch](#) Group 2

Alternatively, use the prompt facility to select from the GL description IBG2 India [Branch](#) Group 2 pop-up.

Branch Group 3

Enter a [Branch](#) Group 3

Alternatively, use the prompt facility to select from the GL description IBG3 India [Branch](#) Group 3 pop-up.

Select **Update (F8)** to update the data and return to the [Branch](#) Maintenance Detail Window.

Maintain Escalation Parameters [6/EQP]

Equipment Servicing uses [job](#) escalation to alert you to outstanding [jobs](#) approaching their [contracted](#) response time.

Note: Escalation takes place only if you select the Start [Job](#) Escalation [task](#) within the L1 application.

The way in which you set up these parameters controls the way in which [job](#) escalation operates for each Equipment Servicing [branch](#). You do not have to use [job](#) escalation in Equipment Servicing and you can implement it at any time.

You use this [task](#) to set the [branch](#) response time used at [call](#) logging. You can define it either by [division](#) and [model](#) group, or as a default for any [division](#) and [model](#) group combination not set up. The software uses the default only if there is no match at a higher level in the response time hierarchy.

Note: You must have exclusive use of the [company](#) to do this.

You must define the following for each workshop [branch](#), and optionally for each [model](#) group serviced within the [branch](#):

- Escalation Time Fence

This is the number of hours or minutes before the target response time at which a [job](#) starts to escalate, for example, 4 hours.

- Escalation Step Interval

This is the number of hours or minutes between each escalation level (or step), for example, 30 minutes.

- Report PM [Jobs](#)

You can exclude planned or scheduled maintenance [jobs](#) from the routine which sends escalation messages to defined users.

- Report [Contracted](#) Responses Only

This only sends escalation messages for pieces of equipment covered by [contract](#) to defined users.

- Default Response Time

This is the response time to use as [branch](#) default.

- Users to Receive Messages

You define a list of user IDs who receive warning messages as [jobs](#) reach certain escalation levels.

Implications

Escalation is an optional facility. If you do not want to use it, you do not need to define the escalation parameters.

The software assumes a seven-day working week. If you work less than this, the software still escalates Monday's [jobs](#) on Sunday, not on the preceding Friday.

Escalation Control Maintenance Selection Window

To display this window, select the Maintain Escalation Parameters [task](#).

Use this window to specify the [division](#) and [model](#) group for which you want to create escalation control.

Fields

Division

Enter an existing [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter an existing [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Note: To set up the [branch](#) default response time, leave both the [Division](#) and [Model](#) Group fields blank.

Note: You should set up a default response time for each [branch](#). The [branch](#) default time sets the [call](#) response time for equipment in a [division](#) and [model](#) group, if there is no match at a higher level in the response time hierarchy.

Press Enter to display the Escalation Control Maintenance Detail window.

Escalation Control Maintenance Detail Window

To display this window, enter the [division](#) and [model](#) group and then press Enter on the Escalation Control Maintenance Selection window.

Use this window to define how you escalate [jobs](#).

Fields

Report PM Jobs

Use this checkbox as follows:

Unchecked - To exclude planned maintenance [jobs](#) from the messages sent when [jobs](#) reach the designated escalation step

Checked - To include planned maintenance [jobs](#) in the messages sent when [jobs](#) reach the designated escalation step

Report Contracted Responses Only

Use this checkbox as follows:

Unchecked - For all [jobs](#) to send messages to the appropriate users

Checked - If only [jobs](#) for pieces of equipment covered by [contract](#) should send messages when they reach the designated escalation steps

Report Escalation before Response Due

Enter the amount of time before the target time at which a [job](#) starts to escalate. This should be in hh:mm format, between 00:15 and 99:45, with the minutes being a multiple of 15.

Reporting Interval for Escalation Due

Enter the amount of time between escalation steps. This should be in hh:mm format, between 00:15 and 99:45, with the minutes being a multiple of 15.

Default Branch Response Time

Enter the default [branch](#) response time.

Equipment Servicing calculates a [job's](#) target date and time by adding the response hours to the date and time when you first logged the [job](#). It adjusts the date to allow for working hours and days and finds the response hours in:

- 1 Special serial numbers
- 2 Contract equipment or lines
- 3 Contract header
- 4 Contract type (including *NO)
- 5 Default branch response time

Note: You can alter the response times defined in a [contract](#) by a percentage in the 3-D matrix.

Reports to be Sent To

Report Step

Enter a step in the range 00 to 98. The step 00 is when the [job](#) reaches, or passes, its target date and time. Step 98 is when you log the [call](#).

The [call](#) stays at 98 until you reach the time specified in the Report Escalation before Response Due field. The [call's](#) report step then moves to the highest step value listed on this window; for example, if you have defined steps 00, 05, 07, 10 and 98, the [call](#) moves to step 10. As you reach escalation, the [call](#) moves through each defined step until 00 is reached.

User ID

Enter a user ID.

Screen Message

Select one of the following:

None (0) - Not to issue a message when the [job](#) reaches this step

Notify (1) - To send a message to this user's message queue

Break (2) - To send a message to this user in break mode

Note: If the [job](#) reaches step 00 and you want a break message, the software sends the message on the first occasion. At any following escalation cycle, there is no message for that [job](#).

The message includes the sender, the date and time sent, the [job](#) number, the escalation step reached, the target date and time, technician number, customer, [model](#) and [serial number](#) and the time to target (hh:mm).

Select **Update (F8)** to save any changes you have made.

Maintain Rebuild of Period End Dates [7/EQP]

Use this [task](#) to rebuild all service and payroll period end dates for a [company](#).

A [service period](#) is a specific number of days, defined by a start and end date. The software holds an end date for each [service period](#).

A payroll period is a specific number of days, defined by a start and end date. The software holds an end date for each payroll period.

The [task](#) submits a batch [job](#) that deletes all existing period end dates for a [company](#). It rebuilds them for both workshop and [accounting periods](#), using the details from the Maintain Daily Calendar [task](#) (where you specify the period end markers).

Note: *You must have exclusive use of Equipment Servicing to do this.*

Note: *You must run this [task](#) after making any changes in the Maintain Daily Calendar [task](#).*

You should use the Enquire on Period End Dates [task](#) after the rebuild, to check that the period end dates are as you expect.

Select **Confirm Submit (F8)** to start the batch [job](#) running.

Maintain Working Days Calendar [8/EQP]

Use this [task](#) to maintain alternative calendars. You can define alternative working days, Saturdays, Sundays, public holidays and shut downs, for future use at [branch](#) and customer levels.

You set up calendar codes and descriptions using the Codes/Parameters file under parameter type CCAL.

Implications

Equipment Servicing holds details of a [company's](#) calendar day types in the same file as its customers' calendar data.

[Company](#) period end dates, set up in a separate file, apply to its customers' calendars. The software uses these for service and payroll period ends.

There is no functionality associated with the customer records in the Calendar file. You can only use customer calendars for memo purposes.

Working Days Calendar Maintenance Selection Window

To display this window, select the Maintain Working Days Calendar [task](#).

Use this window to select the calendar you want to maintain or create.

Fields**Calendar Code**

Enter a new or existing calendar code and then press Enter.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

When you press Enter, if you have entered a new code, the Working Days Calendar Maintenance Base On window is displayed. If you have entered or selected an existing calendar, the Working Days Calendar Maintenance Year window is displayed.

Working Days Calendar Maintenance Base On Window

To display this window, enter a new calendar code and then press Enter on the Working Days Calendar Maintenance Selection window.

Use this window to select a calendar on which to base your new calendar.

Fields**Base Upon Existing Calendar Code**

Use this checkbox as follows:

Unchecked - Not to base the calendar on an existing calendar

Checked - To base the calendar on an existing calendar

Base Upon Calendar Code

Enter an existing calendar to copy.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

Press Enter to display the Working Days Calendar Maintenance Year window.

Working Days Calendar Maintenance Year Window

To display this window, press Enter on the Working Days Calendar Maintenance Base On window or enter or select an existing calendar code and then press Enter on the Working Days Calendar Maintenance Selection window.

Use this window to specify the year.

Fields**Year to Maintain**

Enter the calendar year you want to maintain.

Base Upon Existing Calendar Code

Use this checkbox as follows:

Unchecked - Not to base the calendar on an existing calendar

Checked - To base the calendar on an existing calendar

Base Upon Calendar Code

Enter an existing calendar to copy.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

Select

Enter one of the following:

1 - To amend an existing year for the calendar

4 - To delete an existing year for the calendar

Year

This field displays any existing years set up for the calendar.

Select **Update (F8)** to save any changes.

Working Days Calendar Maintenance Detail Window

To display this window, enter a calendar and year or enter 1 against an existing calendar and then press Enter on the Working Days Calendar Maintenance Year window.

Use this window to define the working and non-working days. The window will display ADDITION or UPDATE in the top right-hand corner, depending on the mode in which you are working.

Fields

Day Types

Enter day types for each day of the month.

Alternatively, use the prompt facility to select from the Day Type pop-up.

Day types are used by the target date and time calculation routines in [call](#) logging, which are used to calculate the target date and time of a [call](#) by adding the retrieved response hours to the date and time of contact. This calculation may need to count a number of days and needs to identify whether a day is a working day or not. It does this by accessing this table with the date, retrieving the day type and accessing the Codes file, where there is a flag to indicate whether the day is a working day or not.

Therefore, if a [call](#) is taken at 4:00 p.m. on a Friday with an 8-hour response time, the target date and time will be calculated as 3:00 p.m. on the following Monday, assuming that Saturday and Sunday are non-working days and the service window is 8:00-15:00.

Note: You can use the scroll bar to display the other months in the year. If you are adding a new calendar, you must fill in all of the days in the year.

Select **Update (F8)** to save any changes and then select **Exit (F3)** to leave the [task](#).

Maintain Invalid Status/Status Code Combinations [9/EQP]

Use this [task](#) to identify the [status codes](#) that you cannot use with the specified [job](#) status.

Note: If you do not define any invalid statuses for a [status code](#), Equipment Servicing presumes that all actions are valid.

Invalid Status/Status Relationship Table Window

To display this window, select the Maintain Invalid Status/[Status Code](#) Combinations [task](#).

Use this window to define the [status codes](#) that you cannot assign to [jobs](#) with the specified status.

Fields

Status

Enter the status for which you want to define invalid actions and then press Enter.

Alternatively, use the prompt facility to select from the [Job Line](#) Status pop-up.

Invalid Status

Enter the status that you do not want to allow for this [job line](#) status.

Alternatively, use the prompt facility to select from the [Job Line](#) Status pop-up.

Options

Delete

Use this to delete the invalid status to [status code](#) combination. This is the default selection.

Functions

Position to Status (F14)

Use this to position the list, starting with the status specified in the Status field.

Select **Update (F8)** to save your changes and then select **Exit (F3)** to leave the [task](#).

Maintain Standard Text [10/EQP]

Use this [task](#) to enter text against specified document types. This text is printed on the documents specified.

Standard Text Entry Selection Window

To display this window, select the Maintain Standard Text [task](#).

Use this window to select the text type you want to define or maintain.

Fields

Text Type

Enter the required text type.

Alternatively, use the prompt facility to select from the Standard Document Text pop-up.

Press Enter to display the Free Format Text window.

Free Format Text Window

To display this window, enter or select a text type and then press Enter on the Standard Text Entry Selection window.

Use this window to specify the text you want to print on the specified document type.

Fields

For the Attention Of

Enter the initials of the person to whom this document is being sent.

Alternatively, use the prompt facility to select from the Text Destination Code pop-up.

Print This Text On

Enter or select the date on which you want to print this text.

Text

Enter the text you want to print on the document.

Note: You can enter fields that you want to print on the documentation, for example, %DATE% to print the date, &ADD110 to print the first line of the address.

Select **Update (F8)** to save the details and then select **Exit (F3)** to leave the [task](#).

Maintain Shift Profile [11/EQP]

Use this [task](#) to set up the customer hours to be covered by your technicians. You should only use this [task](#) if you want to specify shifts that differ from the standard core hours that you have set up on the [Company Profile Maintenance Hours](#) window.

You can define a pattern of shifts (a shift profile) for a single date or a range of dates, for a machine on [contract](#), an entire [contract](#), a non-[contract](#) machine, or for all the machines on a customer's [site](#).

The hours of cover might be for standard periods such as the life of a [contract](#) (for example, every Monday to Friday, 08:00 to 22:00), or for specific dates, or a combination of both.

Once you have set this up, Equipment Servicing will use the shifts when calculating the target response times. Thus response times will always take account of any shift profile that exists for a customer's [site](#), for a machine, or for a [contract](#).

Note that you will have to schedule manually any [call](#) whose target is outside the prime shift for the [company](#).

You can, if required, specify the teams or technicians to work particular shifts. You do this by setting up a territory profile code, specifying that code against the shift, and setting up the territory profile with the correct technicians and teams using the Maintain FSG/Territory/Team [task](#).

Note: In order to use this [task](#), you must check the Allow Override Shift field on the [Company Profile Maintenance Hours](#) window.

Shift Profile Selection Window

To display this window, select the Maintain Shift Profile [task](#).

Fields

Shift Profile Code

Enter a new or existing profile code.

Alternatively, use the prompt facility to select from the Shift Profile Selection pop-up.

Based on Profile

If you are setting up a new profile code and you want to base it on an existing one, enter the existing code in this field.

Alternatively, use the prompt facility to select from the Shift Profile Selection pop-up.

Functions

Add (F10)

Use this if you are setting up a new profile code.

Enter a new profile code and then select **Add (F10)** or enter an existing profile code and then press Enter to display the Shift Profile Maintenance window.

Shift Profile Maintenance Window

To display this window, enter a new profile code and then select **Add (F10)** or enter an existing profile code and then press Enter on the Shift Profile Selection window.

Alternatively, position your cursor on a particular day and then select **Override Shifts (F10)** on the Working Days Calendar Maintenance Detail window in the Maintain Working Days Calendar [task](#).

Use this window to set up the shifts that make up the shift profile.

Fields

Shift No.

Enter the sequence number for the new shift. These shifts must be in start time sequence.

Start Time

Enter the time (format hh:mm) at which the shift starts. Do not type in the separator, only the numbers. For example, 5:30 pm would be entered as 1730.

Finish Time

Enter the time (format hh:mm) at which the shift ends. Do not type in the separator, only the numbers. For example, 5:30 pm would be entered as 1730.

Effective From Date

Enter the date on which this shift comes into effect.

Shifts that overlap in time cannot also overlap in effectivity.

Effective To Date

Enter the date from which this shift is no longer used.

Shifts that overlap in time cannot also overlap in effectivity.

Comment

Enter any useful text.

Territory Profile

You can associate a shift with a territory profile. This links the [field service group](#) information set up in the Maintain FSG/Territory/Team [task](#) with the shift. This is how you link the shift with the teams and technicians who cover that shift. Service Management will use the information to schedule the [job](#) to a technician or team.

Leave this field blank if you do not want Service Management to schedule the [jobs](#). Service Management will still use the shift information to calculate the target response time, but will not schedule the [job](#) unless it falls within your core working day.

You can use the prompt facility on this field to select from the TRPC Territory Profile Code pop-up.

Options

Select

Use this to amend the shift profile. This is the default selection. The values from the table will be placed in the input fields for amendment.

Delete

Use this to delete the shift profile.

Functions

Add to Override Shifts (F8)

This is only displayed if you are in the Maintain Working Days Calendar [task](#) and you are attaching this profile to a day type for the first time.

If this profile has already been attached to a day type and this function has already been selected, the words "Override Shifts" appear towards the top of the window, above the Comment and Territory Profile fields.

If this function has not already been selected, the words "Base Shifts" appear towards the top of the window and **Add to Override Shifts (F8)** is available.

Press Enter to add your new shift to the list towards the top of the window. When you have completed your updates, select **Update (F8)** to save and exit.

Maintain Tax Code [12/EQP]

You can allocate different VAT or sales tax codes to all the elements (excluding parts) in the [cover type/job category](#) charge matrix, and for the various countries involved.

You can set specific VAT or sales tax codes for four of the elements in the [cover type/job category](#) charge matrix. These override the customer account and [site](#) settings of the VAT indicator and the VAT code fields, which would otherwise apply.

You can set up different tax codes for different countries.

To set up the tax codes, specify a [contract type](#) and country. You can set up default values for the tax codes to apply to travel labour, chargeable travel, labour hours and miscellaneous charges.

The software applies these settings to all [job category](#) records for the [cover type](#) and country. Individual codes can be changed, if necessary. Alternatively, all the tax codes can be set up individually for a country.

Tax Code Maintenance Initial Window

To display this window, select the Maintain Tax Code [task](#).

Fields

Cover Type

Enter an existing [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Country Code

Enter an existing country code.

Alternatively, use the prompt facility to select from the Select Country pop-up.

Default Tax Codes

Select the typical tax code for each element. The software will automatically apply this to the various matrices. The few exceptions can then be edited manually.

These values do not override any existing ones on the next window. You would only use these if you are setting up new codes.

Travel

Enter a travel code using a three-character code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

These codes are held on the [General Ledger](#) VAT Codes file, to be applied to travel labour.

Miles/Kilometres

Enter a three-character code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

These codes are [General Ledger](#) VAT codes to be applied to miles/kilometres.

Labour

Enter a three-character code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

These codes are [General Ledger](#) VAT codes to be applied to labour.

Miscellaneous

Enter a three-character code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

These codes are tax codes to be applied to any miscellaneous charges.

Press Enter to display the Tax Code Maintenance Detail window.

Tax Code Maintenance Detail Window

To display this window, press Enter on the Tax Code Maintenance Initial window.

Fields

Job Category

Enter a [job category](#) code of up to three alphanumeric characters.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Trv

Enter a VAT/sales tax code of up to three alphanumeric characters for travel.

This defaults to the value you entered on the Tax Code Maintenance Initial window, but you can change it.

You can use the prompt facility on this field to select from the Tax Code Selection pop-up.

MI/Km

Enter a VAT/sales tax code of up to three alphanumeric characters for mileage or kilometres.

This defaults to the value you entered on the Tax Code Maintenance Initial window, but you can change it.

You can use the prompt facility on this field to select from the Tax Code Selection pop-up.

Lbr

Enter a VAT/sales tax code of up to three alphanumeric characters for labour.

This defaults to the value you entered on the Tax Code Maintenance Initial window, but you can change it.

You can use the prompt facility on this field to select from the Tax Code Selection pop-up.

Msc

Enter a VAT/sales tax code of up to three alphanumeric characters for miscellaneous charges.

This defaults to the value you entered on the Tax Code Maintenance Initial window, but you can change it.

You can use the prompt facility on this field to select from the Tax Code Selection pop-up.

Options**Select**

Use this to update an existing code.

Delete

Use this to delete an existing code.

Select **Update (F8)** to save any changes you have made.

Maintain User/Branch Authorities [15/EQP]

Use this [task](#) to maintain the record of the [branches](#) each user can use and to authorise users to [branches](#).

Note: To authorise yourself to all [branches](#) for a [company](#), enter a special [branch](#) code of *A, instead of specifying each [branch](#) individually.

Authority Maintenance Selection Window

To display this window, select the Maintain User/[Branch](#) Authorities [task](#).

Use this window to select the user and the [branch](#) to which you want to authorise the user.

Fields

User ID

Enter a user ID. This must be a valid user defined to System21 Application [Manager](#).

Branch Code

If you want to authorise this user to a particular [branch](#), enter the [branch](#) code.

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

If you want to authorise this user to all [branches](#), enter *A.

If you leave this field blank, the [Branch](#) Selection window is displayed.

Enter a user ID, enter or select a [branch](#) and then press Enter to display the Authority Maintenance window.

Branch Selection Window

To display this window, enter a user ID and leave the [Branch](#) Code field blank and then press Enter on the Authority Maintenance Selection window.

This window displays all the [branches](#) the user can access.

Fields

Enter a Selection or a Branch Code

Enter the [branch](#) you want to maintain, instead of selecting from the list.

Options

Select

Use this to amend the [branch](#).

Enter a [branch](#) code and then press Enter or select a [branch](#) code to display the Authority Maintenance window.

Authority Maintenance Window

To display this window, enter a [branch](#) code and then press Enter or select a [branch](#) code on the Authority Maintenance Selection window.

Fields

User Group

Enter a valid user group code. User groups are set up using the **Maintain User Group/Function Codes Restrictions task [17/EQP]** to determine which Work Control functions the user group can perform and hence this user can perform.

You can use the prompt facility on this field to select from the User Group pop-up.

Default Branch Code

Note: This field is only displayed if you entered a user ID and the [branch](#) code *A.

Every time you log on and start using Equipment Servicing, the software must know the [branch](#) you want to use. Normally you must select from a list, but if you enter a [branch](#) here, the software automatically assigns this [branch](#) each time you log on.

Enter an existing [branch](#).

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Branch Marker

Use this checkbox as follows:

Unchecked - If this is not the [branch](#) the user accesses when they sign on to Equipment Servicing

Checked - If this is the [branch](#) the user accesses when they sign on to Equipment Servicing

Each user can only have one [branch](#) **checked**. To change the marker, set each marker to **unchecked** before setting the new marker to **checked**.

Amend Parts Supply Order

This field is not used in this release of the product.

Press Enter to update the information and return to the Authority Maintenance Selection window.

Maintain Team Authorisation [16/EQP]

Use this [task](#) to authorise groups of teams to a user for the purpose of manipulating [jobs](#) using the **Work Control task [3/EQS]**. If you are not authorised, when you select [jobs](#) in Work Control for a team there will be no options available. You will not be able to select the [job line](#) to change it. You will, however, still be able to log [jobs](#) for a team.

Team Authorisation Maintenance Selection Window

To display this window, select the Maintain Team Authorisation [task](#).

Fields

District Number

Enter an existing district or a new district using up to two alphanumeric characters.

Alternatively, use the prompt facility to select from the Selection of Teams within Districts pop-up.

Press Enter to display the Team Authorisation Maintenance Detail window.

Team Authorisation Maintenance Detail Window

To display this window, press Enter on the Team Authorisation Maintenance Selection window.

Fields

District Description

Enter a district description of up to 36 alphanumeric characters.

User ID

Enter a user ID of up to 10 alphanumeric characters.

Team Number

Enter the team to which this user will be authorised.

Alternatively, use the prompt facility to select from the Team Description pop-up.

A user can log [calls](#) for any team, whether authorised or not, but a user can only progress [calls](#) for teams to which he or she is authorised.

Options

Delete

Use this to delete this team authorisation from the district.

Press Enter to add the new team and user to the list and then select **Update (F8)** to update and return to the Team Authorisation Maintenance Selection window.

Maintain User Group/Function Codes Restrictions [17/EQP]

Use this [task](#) to create user groups where work control functions are allowed or not allowed for particular user groups. Therefore, one user group may be allowed to perform [job](#) completion from work control whereas another group may not.

If a function is checked against the user group, that user group is NOT allowed to perform that function in Work Control. Therefore, absence of checks means that the user group can do everything.

Once a user group is created, it is attached to users using the Maintain User/[Branch](#) Authorities [task](#). Therefore, the same user can have different authorities and different [branches](#).

User Group/Function Code Restrictions Selection Window

To display this window, select the Maintain User Group/Function Codes Restrictions [task](#).

Fields

User Group

Enter an existing user group. You must set up valid user group codes in the Maintain Codes/Parameters [task](#) before assigning function to the user group.

Alternatively, use the prompt facility to select from the User Group pop-up.

Press Enter to display the User Group/Function Code Restrictions Detail window.

User Group/Function Code Restrictions Detail Window

To display this window, enter or select a user group and then press Enter on the User Group/Function Code Restrictions Selection window.

Fields

Select

Enter **1** to identify the functions in Work Control that this user group is not allowed to perform.

Functions

Select All (F21)

Use this to restrict all functions.

Deselect All (F23)

Use this to remove all restrictions against this user group.

Select **Update (F8)** to save your changes and return to the User Group/Function Code Restrictions Selection window.

Chapter 3 Transaction Codes Maintenance

Maintain Charge Codes [1/EQT]

Use this [task](#) to define the [charge codes](#). You specify [charge codes](#) at transactional level. You use [charge codes](#) to break down entries further against direct transactions and [employee expenses](#). You can include items such as hotel bills or postage [costs](#).

If you set up the [Sales Order Processing](#) charge in Equipment Servicing with an [expense type](#) and [transaction type](#), when you create a [Sales Order Processing](#) order within Equipment Servicing, the software automatically brings the [Sales Order Processing](#) order value across to Equipment Servicing as a [cost](#). Therefore, make sure that you also set up any Equipment Servicing [charge codes](#) you want to use in this way in [Sales Order Processing](#).

If you do not want to enter a [charge code](#), you can set up a blank code. This means you can enter a blank code for the parameter.

Charge Codes Selection Window

To display this window, select the Maintain [Charge Codes task](#).

Use this window to select a [charge code](#) to maintain.

Fields

Charge Code

Enter the two-character code for the [charge code](#) you want to add or amend.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

Select a [charge code](#) or enter a [charge code](#) and then press Enter to display the [Charge Codes Update](#) window.

Charge Codes Update Window

To display this window, select a [charge code](#) or enter a [charge code](#) and then press Enter on the [Charge Codes Selection](#) window.

Use this window to specify the [charge code](#) details.

Fields

Description

Enter the description.

Expense Type

Enter the [expense type](#) to associate with this [charge code](#). The software uses this [expense type](#) when it creates a transaction from [Sales Order Processing](#).

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Transaction Type

Enter the [transaction type](#) to associate with this [charge code](#). The software uses this [transaction type](#) when it creates a transaction from [Sales Order Processing](#).

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

Allow Zero Costs

Use this checkbox as follows:

Unchecked - If expenses and direct transactions cannot be entered without a [cost](#)

Checked - To allow entry of expenses and direct transactions that have a charge but no [cost](#)

For example, this will allow administration charges to be applied to the [job](#).

Note: If you want to bring [costs](#) from [Sales Order Processing](#) into Equipment Servicing, enter both an [expense type](#) and a [transaction type](#). The [charge code](#) in [Sales Order Processing](#) must match that in Equipment Servicing.

Press Enter to save the details.

Maintain Transaction Sources [2/EQT]

Use this [task](#) to enter the [transaction source](#) details.

When you create an Equipment Servicing [company](#), the software creates [transaction source](#) codes. These prefix Equipment Servicing transaction numbers, and identify the originating source of transactions logged against a [job](#):

- PL - [Accounts Payable](#)
- EQ - Equipment Servicing

If the [transaction source](#) is an associated module such as [Accounts Payable](#) or Inventory Management, the [transaction source](#) code is the ID of that module (PL for [Accounts Payable](#), IN for Inventory Management).

When you transfer a code, which is the prefix plus the transaction number, to [General Ledger](#), it is prefixed with the code J. This shows that the transaction is from Equipment Servicing.

When transferring the transaction within [General Ledger](#), for example, from Work in Progress to Profit and Loss, the J is kept, but the [transaction source](#) is changed:

- IM, JM and PL become RC
- SC and SR become RS
- RI - Release of income

Note: Within [General Ledger](#), [transaction sources](#) are known as [transaction types](#).

If necessary, you can define your own [transaction source](#) codes for transactions logged within Equipment Servicing.

Note: We strongly recommend that you use EQ as the [transaction source](#) for direct transactions within Equipment Servicing.

Transaction Sources Selection Window

To display this window, select the Maintain [Transaction Sources task](#).

Use this window to select the [transaction source](#).

Fields

Transaction Source

Enter the [transaction source](#) you want to set up or amend.

Alternatively, use the prompt facility to select from the Selection [Transaction Source](#) pop-up.

Select a [transaction source](#) or enter a [transaction source](#) and then press Enter to display the [Transaction Sources](#) Update window.

Transaction Sources Update Window

To display this window, select a [transaction source](#) or enter a [transaction source](#) and then press Enter on the [Transaction Sources](#) Selection window

Use this window to enter the details for the [transaction sources](#).

Fields

Source Description

Enter the description of the [transaction source](#) code.

Document Reference

If this is a new [transaction source](#), enter the first document reference to use.

Equipment Servicing automatically generates a unique transaction number for each transaction. This number is incremented by one for each transaction.

Press Enter to save the details.

Maintain Expense Types [3/EQT]

Use this [task](#) to set up [expense types](#).

Whenever you enter [cost](#) transactions against a [job](#), you must also enter an [expense type](#). [Expense type](#) transactions typically include materials, labour, accommodation, travel expenses etc.

You must assign a default [expense type](#) to each [timesheet](#), employee expense, travel distance, subcontract and Inventory transaction.

You can analyse [costs](#) at each level by [expense type](#). This gives Equipment Servicing a very flexible, user-defined method of analysing [costs](#).

Expense Types Selection Window

To display this window, select the Maintain [Expense Types task](#).

Use this window to select the [expense type](#).

Fields

Expense Type

Enter the three-character [expense type](#) code you want to set up or amend.

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Select an [expense type](#) or enter an [expense type](#) and then press Enter to display the [Expense Types Update](#) window.

Expense Types Update Window

To display this window, select an [expense type](#) or enter an [expense type](#) and then press Enter on the [Expense Types Selection](#) window.

Use this window to specify the details for the [expense type](#).

Fields

Description

Enter or amend the description.

Category

The software uses a different [cost](#) to complete method for each expense category.

Select one of the following:

Labour

Material

Other Direct

Press Enter to save the details.

Maintain Timesheet Uplift Codes [4/EQT]

Use this [task](#) to define the [uplift codes](#).

You specify [uplift codes](#) on time sheet. You use them to increase or decrease labour [costs](#) and revenue by a percentage.

These codes re-calculate the [cost](#) of labour for an employee in the base currency, using the formula:

[Uplift Code](#) Value x Number of Hours x Hourly Rate

Therefore, if the uplift [cost](#) code is 1.5, the software multiplies the [cost](#) of labour by 1.5 for all [timesheet](#) lines with this [uplift code](#).

Uplift Codes Selection Window

To display this window, select the Maintain [Timesheet Uplift Codes](#) [task](#).

Use this window to select the [uplift code](#).

Fields

Uplift Code

Enter the three-character [uplift code](#) you want to set up or maintain.

Alternatively, use the prompt facility to select from the Select [Timesheet Uplift Code](#) pop-up.

Select an [uplift code](#) or enter an [uplift code](#) and then press Enter to display the [Uplift Codes](#) Update window.

Uplift Codes Update Window

To display this window, select an [uplift code](#) or enter an [uplift code](#) and then press Enter on the [Uplift Codes](#) Selection window.

Use this window to enter the details for the [uplift code](#).

Fields

Uplift Description

Enter a description. The first five characters of the description are shown in the [Timesheet Entry task](#) as field headings to ensure that the [timesheet](#) hours are entered for the correct overtime bucket. We recommend you include the percentage rate in the description.

Cost Rate

This is the [cost](#) uplift rate. If technician works overtime, the [cost](#) to you may remain the same or it may increase. Enter the factor to use when multiplying the number of hours.

Invoice Rate

This is the invoice uplift rate. If a technician works overtime, the customer will be charged at this rate.

Timesheet Column (1-9)

You can optionally enter the column on the [timesheet](#) to which this uplift is to relate.

Function

Override Rate (F15)

Use this to specify a different invoice uplift amount for each different currency code.

Press Enter to save the details.

Uplift Override Codes Window

To display this window, select **Override Rate (F15)** on the [Uplift Codes](#) Update window.

Use this window to specify the details for the [uplift code](#).

Fields

Currency Code

Enter the currency code to which the uplift applies.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Rate

Enter an additional uplift value. This is used in the transaction pricing program as follows.

If £200 is the overtime rate for 1.5 [uplift code](#) and the base rate is £600 per hour, a [timesheet](#) line with 3 hours in the 1.5 [uplift code](#) field will be calculated as:

$$(600 + 200) \times 3 = \text{total charge}$$

If no record is found, the current calculation (actual hours x uplift invoice rate) x labour rate will be used. Therefore, in the above example:

$$(3 \times 1.5) \times \text{£}600 = \text{total charge}$$

Effective Date

Enter or select the effective date from which the additional uplift is to be used.

Select **Update (F8)** to save the details.

Maintain Time Allocation Table [5/EQT]

Use this [task](#) to define the standard working week in [terms](#) of how many hours are normal time and how many are overtime etc.

This is used within the [timesheet](#) function if the technician is set up with a time allocation code defined. This means that as the hours are entered in the [timesheet](#) function they will be split down into the hours on the time allocation profile.

Time Allocation Initial Window

To display this window, select the Maintain Time Allocation Table [task](#).

Use this window to specify the details for the [uplift code](#).

Fields**Time Allocation Code**

Enter the three-character time allocation code.

Alternatively, use the prompt facility to select from the Select Time Allocation Code pop-up.

Effective Date

Enter or select the date from which the code will be valid.

Press Enter to display the Time Allocation Detail window.

Time Allocation Detail Window

To display this window, enter or select a valid time allocation code and date on the Time Allocation Initial window.

Use this window to specify the details for the [uplift code](#).

The field headings on the window (e.g. Norml, OT1.3, OT1.5, OT2.0, OT3.0) are retrieved from the [Timesheet Uplift Codes](#) file. (See the Maintain [Timesheet Uplift Codes](#) section for further details.)

The day types (Monday, Tuesday, etc.) are retrieved from the Parameters file, type DAYT. The descriptions are displayed for all DAYT entries where the time allocation flag is set to **1** in the file.

The non-[job job category](#) description, where the [job](#) classification is **03**, is then displayed underneath the DAYT descriptions.

The number of hours is entered against the appropriate day type and in the Labour Hours field corresponding to the required uplift rate.

Example:

Day Type: normal working Monday

Time allocation required: book first 8 hours at normal rate and anything over 8 hours book at time and a third.

Table entries: 1) 8.0 against Monday and in the Norml field
 2) 99.99 against Monday and in the OT1.3 field

Fields

Norml

Enter the number of working hours that correspond to normal time in a working day.

OT1.3

Enter the number of working hours that correspond to overtime at 1.3 times the [cost](#) in a working day.

OT1.5

Enter the number of working hours that correspond to overtime at 1.5 times the [cost](#) in a working day.

OT2.0

Enter the number of working hours that correspond to overtime at twice the [cost](#) in a working day.

OT3.0

Enter the number of working hours that correspond to overtime at three times the [cost](#) in a working day.

Note: *These field headings are maintained within the Maintain [Timesheet Uplift Codes](#) task.*

Select **Update (F8)** to save the details and return to the Time Allocation Initial window.

Maintain Warranty Claim Defaults [6/EQT]

Currently, on the Work Control Selection Window, the entry of status 87 should display a window that allows the input of a warranty claim value. If the value is entered and **Update (F8)** is selected, the Direct Transaction Entry window is displayed with the entered value passed through as a negative.

The user then has to enter three mandatory codes that will be used to create the transaction.

This [task](#) allows those three codes to be set up and validated so that they become defaults for the Direct Transaction Entry window and it can be run without user intervention.

If no defaults are set up, the Direct Transaction Entry window will be displayed for input of the codes.

Warranty Claim Defaults Window

To display this window, select the Maintain Warranty Claim Defaults [task](#).

Use this window to specify the three defaults.

Fields

Charge Code

Enter the default [charge code](#).

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

The [charge code](#) selected cannot be the [Timesheet](#), Inventory, Subcontract or Travel defaults from the EQ [company](#) profile.

Expense Type

Enter a default [expense type](#).

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

The [expense type](#) selected cannot be the [Timesheet](#), Expenses, Inventory, Subcontract or Travel defaults from the EQ [company](#) profile.

Transaction Type

Enter a default [transaction type](#).

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

The [transaction type](#) selected cannot be the [Timesheet](#), Expenses, Inventory, Subcontract or Travel defaults from the EQ [company](#) profile.

Select **Update (F8)** to save the details and leave the [task](#).

Chapter 4 Customer and Equipment Database

Maintain Additional Customer Details [1/EQE]

You must set up every Equipment Servicing customer as a customer in [Accounts Receivable](#). Equipment Servicing uses much of the customer information set up in [Accounts Receivable](#). You use this [task](#) to set up the extra information needed by Equipment Servicing.

Note: You must set up the customer's additional details before you can record equipment installed at the [site](#).

Additional Details Maintenance Selection Window

To display this window, select the Maintain Additional Customer Details [task](#).

Use this window to select the customer you want to define for Equipment Servicing.

Fields

Please Enter Account Number

Enter the customer account number.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Select a customer or enter a customer code and then press Enter to display the Additional Details Maintenance Address window.

Additional Details Maintenance Address Window

To display this window, select a customer or enter a customer code and then press Enter on the Additional Details Maintenance Selection window.

Press Enter to confirm the account selection and display the Additional Details Maintenance [Location](#) window.

Additional Details Maintenance Location Window

To display this window, press Enter on the Additional Details Maintenance Address window.

Enter Location Code

Enter a [location](#).

Alternatively, leave this field blank and then press Enter to display the [Location](#) Codes window, showing all existing [location](#) codes for the account.

Note: For any account, there can be a number of [locations](#) with different addresses.

Press Enter to display the Additional Details Maintenance Customer Defaults window.

Additional Details Maintenance Customer Defaults Window

To display this window, enter a [location](#) code and then press Enter on the Additional Details Maintenance [Location](#) window or on the [Location](#) Codes window.

Use this window to specify the basic details for the selected customer.

Fields

Account Phone Extension

Enter the telephone extension number of the [site](#) contact.

Note: You use the next window to enter the service telephone and extension number.

Invoice Destination Address A/c

Enter the account to which you send the invoices raised on behalf of this [installation address](#).

And Sequence

Enter the address sequence to which you send the invoices raised on behalf of this [installation address](#).

Withholding tax?

If Turkey function active only

This indicates whether the customer is subject to withholding tax on labour invoice lines

Use the checkbox as follows;

Set to 1 for a customer subject to withholding tax on labour

Set to 0 for customer not subject to withholding tax on labour

Contact

You can optionally enter a contact name for the [installation address](#) in this memo field.

Note: You can also enter a contact for each piece of equipment at the [site](#).

Sundry Account

Select one of the following:

A/C Cust (0) - If the customer is an account customer

Proforma (1) - If you send the customer proforma invoices

Invoice Cust (2) - If you need to send the customer an invoice

Internal Customer

Use this checkbox as follows:

Unchecked - If the customer is an external customer

Checked - If the customer is an internal customer

Region

Enter the service region to which the [installation site](#) belongs.

Alternatively, use the prompt facility to select from the REGN Region pop-up.

The standard reports do not use this field.

Admin Branch

This field defaults to the current [branch](#).

Enter an existing [branch](#).

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

You can have an admin [branch](#) and a [branch](#) that owns the equipment. However, when you move equipment, it is this [branch](#) that determines the [location](#) to which you move the equipment and its new owning [branch](#).

Invoice Consolidation Level

Select one of the following:

Account (1) - For account level invoice consolidation

All outstanding [jobs/contract](#) lines for the same account number will be printed on one invoice.

[Location](#) (2) - For [location](#) level invoice consolidation

All outstanding [jobs/contract](#) lines for the same [location](#) code of the same account will be printed on one invoice.

[Job/Contract](#) (3) (default) - For [job](#) or [contract](#) level invoice consolidation

A separate invoice will be produced for every [job](#) or individual [contract](#).

Consolidation at account or [location](#) is subject to the special rules in [multi-currency](#) and [World Trade](#): there are break points at change of currency and at change of VAT/GST regimes.

Note: You can only change this field at account level. The software automatically makes any change you make for the main customer [site](#) (address sequence 000) to all account [site](#) records.

Invoice Print Format

This field only controls [job](#) invoice printing. [Contract](#) invoices always print in full detail.

Select one of the following:

Detail (0) (default) - To print all [job](#) details on [job](#) invoices

Every transaction on a [job](#) will be printed on a separate line.

Summary (1) - To print summary lines on [job](#) invoices where a single line will be printed for all labour transactions per [job](#), one line for all expense lines per [job](#) and one line for all parts lines per [job](#)

Partial (2) - To print summary lines on [job](#) invoices where a single line will be printed for all labour transactions per [job](#), one line for all expense lines per [job](#) but parts lines in detail

Customer Ref. for Job

Use this checkbox as follows:

Unchecked - If you do not require a customer reference when you log a [call](#)

Checked - If you must enter a customer reference when you log a [call](#)

Customer Ref. for Contracts

Use this checkbox as follows:

Unchecked - If you do not require a customer reference when you set up a [contract](#)

Checked - If you must enter a customer reference when you set up a [contract](#)

Labour Price List

Enter an Equipment Servicing labour price list created via the Maintain Labour Price List [task](#) (if you are pricing labour by rate) or a labour price list from the Maintain [Cost/Price Lists task](#) (if you are pricing labour by grade).

You can use the prompt facility on this field to select from the Price List Selection pop-up. If the prompt facility is used, only the relevant labour lists are shown.

Currency Customer

Use this checkbox as follows:

Unchecked - If this customer is not a currency customer within Equipment Servicing

Checked - If this customer is a currency customer within Equipment Servicing

Note: This value in this field can differ from that in the Currency Customer field used by [Sales Order Processing](#).

Parts Price List

This field is only displayed if you **checked** the [Sales Order Processing](#) Active field in the Maintain [Company](#) Profile [task](#).

Enter a [Sales Order Processing parts list](#).

Alternatively, use the prompt facility to select from the Pricing Type Select pop-up.

Equipment Servicing uses this list to price parts fitted and logged in the technical report.

Currency Code

If you left the Currency Customer field **unchecked**, this field defaults to the base currency of the [Accounts Receivable company](#) and you cannot change it.

If you **checked** the Currency Customer field, this field defaults to the currency in the Customer Master file and you can change it. You must set up the currency code in [General Ledger](#).

You can use the prompt facility on this field to select from the Select Currency pop-up.

Parts Disc. List

This field is only displayed if you **checked** the [Sales Order Processing](#) Active field in the Maintain [Company](#) Profile [task](#).

Enter a [Sales Order Processing](#) discount list; this should either have a blank currency or one that matches the customer currency

Alternatively, use the prompt facility to select from the Pricing Type Select pop-up.

Equipment Servicing uses this list to calculate discounts due on parts fitted and logged in the technical report.

Currency Rate Code

Enter the currency rate to convert the customer's prime currency into the [company's](#) base currency, during [contract](#) and [job](#) invoicing. This defaults from the [company](#) profile. You must set up the currency rate code in [General Ledger](#).

You can use the prompt facility on this field to select from the Select Currency Rate Code pop-up.

VAT Code

Enter a three-character code. You must set up the VAT code in the [General Ledger](#). This field defaults to the value in the Customer Master file.

This is the VAT code used for fixed price or fixed [visit](#) charges within the Equipment Servicing invoicing routines.

You can use the prompt facility on this field to select from the Tax Code Selection pop-up.

Functions

Trade Details (F5)

This is only displayed if you use [World Trade](#). Use this to enter [World Trade](#) information. For more details, refer to the [World Trade](#) product guide.

Press Enter to display the Additional Details Maintenance Details window.

Additional Details Maintenance Details Window

To display this window, press Enter on the Additional Details Maintenance Customer Defaults window.

Use this window to specify further charging details for the selected customer.

Fields

Customer Priority

Enter this customer's priority. This is a number from 0 to 4. The highest priority depends on the setting of the Maximum Customer Importance field on the [Company](#) Profile Maintenance Response window.

Equipment Servicing uses the customer priority in the 3-D matrix (with volume segment and machine up or down) to apply percentage reductions to [call](#) response time.

Customer Calendar Code

Enter a customer calendar code.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

The field is for memo use only.

Geographic Code (Two Fields)

Enter this customer's geographic code.

You use postcodes or other geographic codes (geocodes) to define territories, or patches. You can then allocate the patches to teams and technicians. You can also use the geographic code when allocating work.

Service Telephone Number

Enter the telephone number for the contact at the customer [site](#). This can be a different number from the [installation address](#) phone number.

Service Telephone Extension

Enter the contact's telephone extension number.

Service Fax Number

Enter the fax number for the contact.

Charge Standard Distance Value

This field defaults from the [company](#) profile.

Use this checkbox as follows:

Unchecked - Not to charge any standard distance value

Checked - To charge a standard distance value

Note: *If you check this field, the Charge Actual Distance Driven and Charge Zones fields must be left unchecked.*

Standard Mile/Km Value

If the Charge Standard Distance Value field is **unchecked**, leave this field as **.00**.

If the Charge Standard Distance Value field is **checked**, enter the charge made for a return trip to the [site](#). This field holds 11 digits plus two decimal places.

Charge Actual Distance Driven

This field defaults from the [company](#) profile.

Use this checkbox as follows:

Unchecked - Not to charge according to the actual distance driven

Checked - To charge for the actual distance driven

You enter the actual distance driven during technical reporting. Equipment Servicing multiplies this by the value in the Charge per Mile/Km field.

Note: If you check this field, the Charge Standard Distance Value and Charge Zones fields must be left unchecked.

Charge per Mile/Km

If the Charge Actual Distance Driven field is **unchecked**, leave this field as **.00**.

If the Charge Actual Distance Driven field is **checked**, enter the charge per mile or km. This field holds 11 digits plus two decimal places.

Charge Zones

This field defaults from the [company](#) profile.

Use this checkbox as follows:

Unchecked - Not to charge for travel according to zone

Checked - To charge for travel according to zone

Note: If you check this field, the Charge Standard Distance Value and Charge Actual Distance Driven fields must be left unchecked.

Zone Code to Charge

If the Charge Zones field is **unchecked**, leave this field **blank**.

If the Charge Zones field is **checked**, enter an existing zone code or use the prompt facility to select from the [Branch](#) Zone Code Selection pop-up.

The zone code holds the flat rate [branch](#) charge for [visiting](#) a customer [site](#) in the zone.

The zone code entered must exist for the customer's currency.

Time Zone

Time zones are used when the Service [company](#) has to operate across different time zones. You can specify the time zones as a number of hours' difference ([called](#) the offset time) from the system time and create them in the Inventory Descriptions file under major code TIMZ. Once you

have specified the offset time, when system [calls](#) are received the customer date and time are recorded with them, and are used to calculate target times.

You can optionally enter a time zone for the customer.

Alternatively, use the prompt facility to select from the TIMZ Time Zones pop-up.

Job Discount

Enter the percentage discount for the [job](#). This defaults to **0**.

Warranty Claim

Enter the type of warranty claim. For example, the warranty could cover the parts, labour, both or neither.

Alternatively, use the prompt facility to select from the Warranty Claim Flag pop-up.

Service Account

Enter the account number to bill if any part of the [job](#) is chargeable.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

This field defaults to the account number specified on the Additional Details Maintenance Selection window.

Location Code

Enter the [location](#) to bill if any part of the [job](#) is chargeable. This defaults to the [location](#) number specified on the Additional Details Maintenance Selection window.

War. Claim Labour Credit List

Enter the labour rate list to use for a warranty claim for this account.

Alternatively, use the prompt facility to select from the Warranty Claim Labour Credit pop-up.

Fixed/Hourly

Use this checkbox as follows:

Unchecked - To charge the [job](#) at a fixed rate

Checked - To charge the [job](#) at an hourly rate

These apply to warranty claim [jobs](#) for the customer.

Press Enter to display the Additional Details Maintenance Customer Hours window.

Additional Details Maintenance Customer Hours Window

To display this window, press Enter on the Additional Details Maintenance Details window.

Use this window to define the opening hours of the customer [site](#).

Fields

From/To

Enter times in 24-hour clock format to show when the [site](#) is open, or accepts service [calls](#). These times are for memo purposes only.

Select **Update (F8)** to save the information and return to the Additional Details Maintenance Selection window.

Maintain Model [2/EQE]

Use this [task](#) to set up and maintain the details of all your [models](#) and peripherals.

Concepts

You can record specific [job](#) categories for [models](#) of differing types.

The different [model](#) categories are:

- Equipment
- Peripheral
- Component
- Internal [Model](#)
- Exchange Item
- Non-active [Model](#)

These [model](#) categories are all shipped in the Equipment Servicing Codes/Parameters file under type PERI.

You can enter a number of inventory item codes against each [model](#). The software uses these codes when [Sales Order Processing](#) updates Equipment Servicing after the sale of a machine.

You can use a [serial number](#) in conjunction with the [model](#), to give a unique identity to a particular piece of equipment. You can define any number of peripherals for each [model](#) and [serial number](#) combination. You can either assign a peripheral a [serial number](#), or enter it as a quantity. You can identify a peripheral with a configuration code.

Implications

You must use this [task](#) to set up [models](#) before you can enter them against [sites](#) as [installations](#). You cannot perform any [contract](#) or transaction processing until you have established this equipment database.

The Volume Segment ID field for a [model](#) determines how many days or copies constitute a repeat [call](#).

You can use a [model](#) to:

- Link a [model](#) to its correct [contract](#) rates and its [scheduled visit profile](#), using the [model](#) groups and [model](#) sub-groups

- Generate a schedule of planned maintenance [visits](#) for [contracts](#) covering the [model](#) using the [scheduled visit profile](#)

Note: A profile code specified on a [contract](#) header supersedes the profile codes associated with the [models](#).

Model Maintenance Selection Window

To display this window, select the Maintain [Model task](#).

Use this window to specify the [model](#) you want to define or maintain.

Fields

Model

Enter the [model](#) you want to set up or update, using up to 15 characters.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Select a [model](#) or enter a [model](#) and then press Enter to display the [Model](#) Maintenance Hierarchy window.

Model Master Scan Pop-up

To display this pop-up, use the prompt facility on the [Model](#) field on the [Model](#) Maintenance Selection window.

This pop-up is used throughout Equipment Processing to assist in identifying a [model](#).

Fields

Search Type

Select one of the following:

[Model](#) Reference

[Model](#) Description

Search Criteria

Use this field to make a selection based on the search words which currently exist for the [model](#).

Enter the relevant search words for the [model](#) and then press Enter to display the [Model](#) Master Scan List pop-up showing all [models](#) that meet the specified criteria.

Note: If only one reference meets the criteria, the application displays the [Model](#) Maintenance window and inserts the [model](#) number automatically.

Model Master Scan List Pop-up

To display this pop-up, enter selection criteria and then press Enter on the [Model](#) Master Scan pop-up.

This pop-up displays all [models](#) meeting the criteria specified.

Select the [model](#) you wish to use.

Model Maintenance Hierarchy Window

To display this window, enter a [model](#) and then press Enter or select a [model](#) on the [Model](#) Maintenance Selection window.

Use this window to specify the basic details for this [model](#).

Fields

Description

Enter the description of the [model](#).

Division

Enter the [division](#) for this [model](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter the [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Model Sub Group

Enter the [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

Model Type

Enter a [model](#) type.

Alternatively, use the prompt facility to select from the [Model](#) Type pop-up.

Labour Price List

Enter an existing labour price list.

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

This field is not mandatory, as the labour may be being priced by a list further up in the labour price hierarchy.

Visit Profile Code

Enter an existing schedule [visit](#) profile (SVP).

Alternatively, use the prompt facility to select from the [Scheduled Visit Profile](#) pop-up.

Equipment Servicing uses this to generate the [visits](#) on a [contract](#). It looks for the relevant SVP according to the following hierarchy:

- 1 Use the SVP on the contract header.
- 2 If not found, use the model file SVP.
- 3 If not found, use the model group file SVP.
- 4 If not found, use the company profile SVP.
- 5 If not found, do not generate any visits.

Note: *If Equipment Servicing finds a [scheduled visit profile](#), it generates [visits](#) when you check the Generate [Visits](#) field on the [Contract Equipment Maintenance Detail](#) window.*

Points

Enter a number between 0 and 999 to define the service index of the [model](#). Equipment Servicing uses this during automatic technician assignment, to select the technician if all other workload factors are equal.

Inventory Item Codes

Enter existing inventory items. You use these codes to set up [installation](#) details automatically for a machine sold through [Sales Order Processing](#).

Do not include inventory item codes on a peripheral.

Press Enter to display the [Model](#) Maintenance Details window.

Model Maintenance Details Window

To display this window, press Enter on the [Model](#) Maintenance Hierarchy window.

Use this window to set up further [model](#) details.

Fields

Van Kit Number to Fix

This field is for future development.

Av. Hours per Breakdown

Enter the default [job](#) duration for breakdown [calls](#), in hours and minutes between 00:01 and 99:59. This field is mandatory unless the [model](#) is a peripheral.

Av. Hours per PM Visit

Enter the default [job](#) duration for planned maintenance [jobs](#), in hours and minutes between 00:01 and 99:59. This field is mandatory unless the [model](#) is a peripheral.

Workshop Preparation

This field is for future development.

However, you must use this checkbox as follows:

Unchecked - If you do not require workshop preparation

Checked - If you require workshop preparation

Technician Needed for Installation

This field is only relevant for machines, not for peripherals.

Use this checkbox as follows:

Unchecked - If you do not want Equipment Servicing to assign a technician automatically for [installation](#)

Checked - To create an [installation job](#) automatically for machines sold through [Sales Order Processing](#), when you complete the [Sales Order Processing](#) Transfer to EQ. You must set up the default [job category](#) for an [installation job](#).

Manufacturers ID

Enter a manufacturer's name, as set up in the Inventory Descriptions file under major type MFID.

Alternatively, use the prompt facility to select from the MFID Manufacturer ID pop-up.

Warranty Months

Enter the number of months' warranty cover for this [model](#).

Volume Segment ID

Enter the number of days, or units, used to calculate a repeat [call](#) for this [model](#) in [call](#) logging.

Alternatively, use the prompt facility to select from the Volume Segments pop-up.

The value must be between 0 and 99 and you must set it up in the Maintain Volume Segment [task](#).

Automatic Call Assignment

Use this checkbox as follows:

Unchecked - To exclude [calls](#) for this [model](#) from automatic [call](#) assignment

Checked - To include [calls](#) for this [model](#) in automatic [call](#) assignment (ACA)

You can also limit ACA operation using the Maintain Codes/Parameters, Maintain [Job Category](#), and Maintain Technician [tasks](#).

Configuration Code

This field classifies your peripherals. Leave it blank for machines. For peripherals, enter the configuration code.

Alternatively, use the prompt facility to select from the Configuration Code pop-up.

Note: You define these codes in the Codes/Parameters file under type CONF.

The first five configuration codes of peripherals attached to any machine are displayed during [call](#) logging, on the More Details pop-up.

Statistical Family 1-3

These fields are for memo or reporting purposes only. Enter the statistical family.

Alternatively, use the prompt facility to select from the Statistical Family ([Models](#)) pop-up.

Note: *You define these codes in Codes/Parameters file, under type STA1.*

Target Mean Repair Time

You can set up a [model](#) standard for target mean repair time. This will allow you to use it in reports to compare with actual repair times.

Target Days between Visits

You can set up a [model](#) standard for target number of days between mean repair time. This will allow you to use it in reports to compare with actual repair times.

Number of Meters

Enter the number of meters for the [model](#), in the range 0 to 99.

The number of meters entered here will become the default for any [installations](#) for this [model](#). The meters can then also be maintained at [Installation](#) level.

Note: *Although up to 99 meters can be tracked, only meter numbers 01 and 02 can be used for billing.*

Warranty Units Meter 1

Enter the agreed number of units covered by the warranty. This must be a positive whole number.

Once this number of units is exceeded, any [calls](#) logged that are created, as warranty [calls](#) will be suggested for change to breakdown [jobs](#).

Press Enter to display the next window. If the Number of Meters field is blank or 0, the [Model](#) Maintenance Workshop window will be displayed. If you have entered a value greater than 0, the [Model](#) Meters Detail window will be displayed.

Model Meters Details Window

To display this window, enter a value greater than 0 in the Number of Meters field and then press Enter on the [Model](#) Maintenance Details window.

Use this window to set up default meter information for the [model](#).

Fields

No.

This field displays the meter number.

The system generates meter numbers that correspond with the number of meters entered on the [Model](#) Maintenance Details window.

Description

Enter a description for each of the meters, using up to 30 characters.

Mandatory

Enter **1** if an entry for this meter is mandatory. If the reading for the meter is mandatory, each time readings are entered, the user will be forced to enter readings for the mandatory meters.

Number of Digits

Enter the total number of digits on the meter.

***Note:** Equipment Servicing uses these values to check for meter roll over when it reaches its maximum reading.*

Billing

This is entered by the system. Only meter numbers 01 and 02 can be billable. Any meter beyond 02 is a counting meter only.

Press Enter to display the [Model](#) Maintenance Workshop window.

Model Maintenance Workshop Window

To display this window, press Enter on the [Model](#) Maintenance Details window or on the [Model](#) Meters Details window.

Use this window to specify the price list and charging information for the [model](#).

Fields**Parts Price List**

Enter the parts price list to use for this [model](#).

Alternatively, use the prompt facility to select from the Select Price List pop-up.

Estimate/Quotation Required

Enter one of the following:

0 - If you do not require either an estimate or [quotation](#)

1 - If you require an estimate

2 - If you require a [quotation](#)

3 - If you require an estimate

4 - If you require a [quotation](#)

You can use the prompt facility on this field to select from the Estimate Request Type pop-up.

Serial Number Mandatory at Job Creation

Use this checkbox as follows:

Unchecked - If you do not need to enter a [serial number](#) to book a [job](#) for this [division](#)

Checked - If you must specify the equipment's [serial number](#) in order to book a [job](#)

Accessory List Code

Enter the accessory list for this [model](#).

Alternatively, use the prompt facility to select from the Accessory Selection pop-up.

Certification Required

This is a memo field.

Use this checkbox as follows:

Unchecked - If you do not require certification

Checked - If you require certification

% Tolerance for Estimates on Customer Stock/Value at this Level

These fields are not used in this release of the product.

% Tolerance for Estimates on Own Stock/Value at this Level

These fields are not used in this release of the product.

Estimate Creation Fee/Value at this Level

These fields are not used in this release of the product.

Fixed Price Charge/Value at this Level

These fields are not used in this release of the product.

Warranty Months

Use this checkbox as follows:

Unchecked - If there are no warranty months for this [model](#)

Checked - If there are warranty months for this [model](#)

Enter the length of the warranty in months in the Value at this Level field opposite this checkbox.

Warranty Claims

Use this checkbox as follows:

Unchecked - If you do not allow warranty claims against this [model](#)

Checked - If you allow warranty claims against this [model](#)

Default Labour Credit Model for Claims

Use this checkbox as follows:

Unchecked - If this is not the default labour credit [model](#) for warranty claims

Checked - If this is the default labour credit [model](#) for warranty claims

Only a single [model](#) within the system can have this field **checked**.

Value at this Level

This field is not used in this release of the product.

Functions

Warranty Parts (F14)

Use this to display the Warranty Parts Maintenance pop-up so that you can enter a list of the parts included on this [model's](#) warranty.

Select **Update (F8)** to update the [model](#) and return to the [Model](#) Maintenance Selection window.

If the [model](#) description has been amended or a new [model](#) has been added the [Model](#) Search Words pop-up is displayed.

If the [model](#) description has not been amended for an existing [model](#), the [Model](#) Maintenance Selection window is re-displayed.

Warranty Parts Maintenance Pop-up

To display this pop-up, select **Warranty Parts (F14)** on the [Model](#) Maintenance Workshop window.

Use this pop-up to define the list of parts covered by the warranty on this [model](#).

Fields

Part Number

Enter the part that this [model's](#) warranty covers.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Months

Enter the length of warranty, in months, for this part.

Select **Update (F8)** to save the information and return to the [Model](#) Maintenance Selection window.

Model Search Words Pop-up

To display this pop-up, select **Update (F8)** on the [Model](#) Maintenance Workshop window when you are adding a new [model](#) or you have amended the description of an existing [model](#).

Use this pop-up to add or amend words relevant to the [model](#) which can be used in the [model](#) search.

Fields

Model Key Words

Add words relevant to the [model](#) to be used in the [model](#) search. Up to 20 words may be added.

For new [models](#), each part of the description shows as a key word.

For existing [models](#), the previous version of the key words is displayed. To see the latest version, select **Rebuild (F13)**.

Functions

Rebuild (F13)

Use this to rebuild the search engine, adding new details to the search. For existing [models](#), this can be selected to cancel changes to the key words and select the old index.

Press Enter to update and return to the [Model](#) Maintenance Selection window.

Maintain Installation Details [3/EQE]

Use this [task](#) to specify the equipment a customer holds on [site](#). You can enter both [models](#) and peripherals and give them all [serial numbers](#).

When you enter a new [installation](#), the account code and address normally already exist in Equipment Servicing. However, you can enter a new cash customer. You then define each piece of equipment at the [installation](#) by its [model](#) number and its [serial number](#). If you do not know the [serial number](#), leave it blank and enter a [model](#) quantity. You can then enter individual [serial numbers](#) later.

Equipment Servicing does not apply the new [serial numbers](#) immediately; it stores the numbers for update when you run the Day End Routines [task](#).

Note: For [World Trade](#) and [multi-currency](#), you can apply VAT at machine level.

Implications

The information you set up here:

- Means you can locate any piece of equipment
- Calculates the warranty expiry date for a piece of equipment by adding warranty months to [installation](#) date
- Allows you to assign a specific technician to all [jobs](#) for the equipment (overriding the automatic technician assignment)

You must set the Assign [Calls](#) Only to Preferred Technician for Machine field on the [Company](#) Profile Maintenance [Calls](#) window and enter a technician against the installed equipment.

Installation Maintenance Selection Window

To display this window, select the Maintain [Installation](#) Details [task](#).

Use this window to select the [model](#) or customer for which you want to enter [installation](#) details.

Fields

Model

Enter an existing [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Do not select a peripheral. You add peripheral details to a machine using a separate function.

Note: If you have not entered any equipment yet, you must also enter an account number.

Serial Number

Enter an existing [serial number](#).

If you enter a [serial number](#) and no [model](#), press Enter to display the [model](#), or, if the [serial number](#) is not unique, select the correct [model](#) from the displayed pop-up.

Account Number

Enter an existing customer. You must have set up this customer in [Accounts Receivable](#) and Equipment Servicing.

You can use the prompt facility on this field to select from the Customer Scan pop-up.

Account Address

Enter the address sequence for the specified customer.

Functions

Serial Maint. (F9)

Enter the [model](#) and then use this to display the [Serial Number](#) Maintenance window.

Address (F15)

Enter the account and address and then use this to display the [Installation](#) Name and Address Detail window.

Machine (F16)

Enter a [model](#), account number and sequence number and then use this to display the [Installation](#) Equipment Maintenance window.

Enter the account number and address sequence and then press Enter to display the [Installation](#) Equipment Maintenance window, or enter the [model](#) and [serial number](#) and then press Enter to display the Equipment Detail Maintenance window.

Serial Number Maintenance Window

To display this window, enter the [model](#) number or the [model](#) number and [serial number](#) and then select **Serial Maint. (F9)** on the [Installation](#) Maintenance Selection window. If you have entered only a [model](#) number, the Equipment by [Model](#) window is displayed for you to select a [serial number](#).

Use this window to specify the [serial number](#) for the selected [model](#).

Fields

Serial

Enter a [serial number](#) that does not already exist.

You can enter [serial numbers](#), in line with the equipment shown, up to a maximum quantity of 99. You do not have to allocate [serial numbers](#) for the entire quantity displayed.

History

Enter one of the following:

0 - Not to hold the [job](#) history against this [serial number](#)

1 - To hold all existing [job](#) history against this [serial number](#)

Note: Where there is more than one [serial number](#), you must enter 1 against the new [serial number](#) that is to inherit the history of original [serial number](#).

Press Enter and then select **Update (F8)** to save the changes.

Note: You must run the Day End Routines [task](#) to change the [serial numbers](#). Until this [task](#) is run, the original [serial number](#) will still be used throughout the system.

Installation Name and Address Detail Window

To display this window, enter the account and address sequence and then select **Address (F15)** on the [Installation](#) Maintenance Selection window.

Use this window to specify the [installation](#) name and address details for the equipment.

Fields

Account Name

Enter the name for the equipment [location](#). This defaults to the selected account.

In update mode, this field is for display only.

Currency Customer

Select one of the following:

0 - If the customer is not [multi-currency](#)

1 - If the customer is [multi-currency](#)

Account Address

Enter the [installation](#), or [site](#), address. This defaults to the selected address.

In update mode, this address is for display only. This information must be modified through the [Accounts Receivable](#) maintenance [tasks](#).

Currency Code

Enter the customer's currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

This field defaults to the value from the Maintain Additional Customer Details [task](#).

Currency Rate Code

Enter the currency rate.

Alternatively, use the prompt facility to select from the Select Currency Rate Code pop-up.

This field defaults to the value from the Maintain Additional Customer Details [task](#).

VAT Code

Enter the customer VAT code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

This defaults to the value from the Maintain Additional Customer Details [task](#).

Geographic Code

Enter the customer's geographic code for this address. You use this to define territories allocated to teams and technicians.

Inv. Cons. Level

Enter one of the following [invoice consolidation levels](#):

1 - Account level

2 - [Location](#) level

3 - [Job/contract](#) level

Telephone Number

Enter the telephone number. This field defaults from the Maintain Additional Customer Details [task](#) and cannot be maintained in update mode.

Ext No.

Enter the contact telephone extension number.

Note: *You maintain the Equipment Servicing telephone number and extension on the Additional Details Maintenance Details window.*

Inv. Prt. Format

Enter one of the following:

Admin Branch Code

Enter the administration [branch](#). This field defaults to the [branch](#) from the Maintain Additional Customer Details [task](#). This can be different from the [branch](#) which owns the equipment.

Job Ref

Enter one of the following:

0 - If you do not require a customer reference when entering a [job](#)

1 - If you require a customer reference when entering a [job](#)

Account Contact

Enter the contact name for this account. This defaults to the contact name for the [installation address](#).

There is also an equipment contact field for each piece of equipment on the [site](#).

Region

Enter the service region to which the [installation site](#) belongs.

Alternatively, use the prompt facility to select from the Region pop-up.

This field defaults from Maintain Additional Customer Details [task](#).

Note: You define these codes in the Codes/Parameters file, under type REGN.

You can report on service and [contract](#) revenue by service region.

Contract Ref

Enter one of the following:

0 - If you do not require a customer reference when entering a [contract](#)

1 - If you require a customer reference when entering a [contract](#)

Customer Priority

Enter a value from 0 to 4 to define the customer priority. This defaults from the Maintain Additional Customer Details [task](#). The software uses customer priority in the 3-D matrix (with volume segment and machine up or down) to apply a percentage reduction to [call](#) response time, if applicable.

You specify whether 0 or 4 is the highest priority in the Maximum Customer Importance field on the [Company](#) Profile Maintenance Response window.

Time Zone

Time zones are used when the service [company](#) has to operate across different time zones. You can specify the time zones as a number of hours' difference ([called](#) the offset time) from the system time and create them in the Inventory Descriptions file under major code TIMZ. Once you have specified the offset time, when system [calls](#) are received, the customer date and time are recorded with them and are used to calculate target times.

Enter a valid time zone for the customer.

Alternatively, use the prompt facility to select from the TIMZ Time Zones pop-up.

Statement Code

Enter the customer [site](#) account or statement code. This defaults from the Maintain Additional Customer Details [task](#).

Invoice Address

Enter an existing account and [location](#) code. This name and address is the Invoice To address on invoices. This defaults from the Maintain Additional Customer Details [task](#).

Parts Price List

Enter the [Sales Order Processing](#) list to use for pricing the parts. This defaults from the Maintain Additional Customer Details [task](#).

Parts Discount List

Enter the [Sales Order Processing](#) discount list to use for pricing parts. This defaults from the Maintain Additional Customer Details [task](#).

Functions

Text (F21)

Use this to enter free-format text.

Select **Update (F8)** to update the details.

Installation Equipment Maintenance Window

To display this window, enter the account number and the account address and then press Enter on the [Installation](#) Maintenance Selection window.

Use this window to specify the customer equipment details.

Fields

Select (Sel)

Enter one of the following:

- 1 - To maintain the [installation](#) equipment record
- 3 - To maintain the machine configuration (and add any child equipment to the machine)
- 4 - To delete the [installation](#) equipment record, so long as the equipment:
 - Is not on a pending or active [contract](#)
 - Has no invoice pending records
 - Has no [job](#)-line records awaiting invoicing
 - Has no [job](#)-lines outstanding
- 5 - To display the Peripheral Configuration window, where you can enter brief details of the peripherals associated with the equipment

6 - To display the Meter Reading Entry window

Note: *The only machine with billable meters is the prime machine and only prime machines can be entered on meterage [contracts](#).*

Model

To add a piece of equipment, enter an existing [model](#) in this field.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial

To add a piece of equipment, enter the [serial number](#) in this field, using up to 15 characters. The number must have an associated [model](#), and the [model](#) and [serial number](#) combination must be unique.

Quantity

Enter the quantity of this [model](#) at the customer [site](#). This must be in the range 1 to 9999999.

Note: *If you enter a [serial number](#), you do not have to enter the quantity.*

Functions

Fold/Truncate (F13)

Use this to toggle between displaying the [model](#) descriptions and the codes.

Address (F15)

Use this to display the [Installation](#) Name and Address Detail window.

Text (F21)

Use this to add free-format text to the item.

Press Enter to save any entered details and then select **Exit (F3)**.

Machine Configuration Window

To display this window, enter 3 against a [model](#) and then press Enter on the [Installation](#) Equipment Maintenance window.

Use this window to maintain a machine hierarchy structure by linking records that exist in the machine file.

The window will show the machine hierarchy (3 levels only) for the machine.

All records found will be displayed in a tree structure with the [model](#) and its effective children and the next parent with its effective children etc.

Note: *[Contracts](#) should be created for prime machines only. If you add a [contract](#) piece of equipment into a configuration, [call](#) logging will ignore its [contract](#) and use the master machine's [contract](#) to control response times and charging on the [job](#).*

Options

Details

Use this to display the Equipment Detail Maintenance window for the selected machine.

Add Parent

Use this display the Add Equipment pop-up.

Add Child

Use this to display the Add Equipment pop-up.

Delete

Use this to display the Delete Equipment pop-up. The Effective Date field will default to the current date. If a parent is selected for deletion, all the structures below it will have the same date added as the end date. In addition, a meter reading will be requested, if applicable, on the assumption that a technician has been out and removed the machine from the configuration so that a reading will be available.

Peripherals

Use this to display the Peripheral Configuration window.

Select an option or select **Previous (F12)** to return to the [Installation](#) Equipment Maintenance window.

Add Equipment Pop-up

To display this window, select Add Parent or Add Child against a [model](#) on the Machine Configuration window.

You can use this to add a parent or a child.

If you are adding a parent, use this pop-up to allow the parent machine in a configuration to be changed. The date entered must be less than the [installation](#) date of any parent/child below it in the hierarchy. If the parent is replaced, all child machines will be updated with the new parent details.

If you are adding a child, use this pop-up to add machines into the hierarchy. The new machine is assumed to be a child of the selected machine. The machine entered must be at the customer's [site](#) and not already in this hierarchy. A start date should be entered but the date cannot be before the [installation](#) date of the master machine. However, a child may have a start date prior to that of its current parent. In addition, when a machine is added in here, a list of meters on the master machine is displayed, and the one which is to count as the child machine can be selected. The assumption is that the only reason a machine is being swapped is that it has been replaced. In this case, there will be a final reading against the machine being removed and an initial reading against the one being added.

Fields**Child Model**

Enter the [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#)/Serial Selection pop-up.

Child Serial

Enter the [serial number](#).

Alternatively, use the prompt facility to select from the [Model](#)/Serial Selection pop-up.

Enter the [model](#) and [serial number](#) and then press Enter to return to the [Installation](#) Equipment Maintenance window.

Peripheral Configuration Window

To display this window, select Peripherals against a [model](#) on the Machine Configuration window. Alternatively, select **Peripherals (F20)** on the Equipment Detail Maintenance window.

Fields

Model

Enter a valid peripheral [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial No

Enter a [serial number](#) for the peripheral.

Ins. Date

Enter or select the [installation](#) date.

Qty

Enter a quantity in the range 1 to 99999999.

***Note:** If you enter a [serial number](#), Equipment Servicing sets this field to 1.*

Equip. Stat

Enter the status of the equipment. This field defaults to **S**.

***Note:** You set up valid codes under parameter type STAT in the Codes/Parameters file.*

Text

This field displays an asterisk (*) if text has been entered against this peripheral.

Options

Select

Use this to update the date, quantity and status.

Delete

Use this to delete the peripheral. You cannot delete a peripheral while it is on an active [contract](#).

Functions

Fold/Truncate (F13)

Use this to toggle between displaying part descriptions and the codes.

Text (F21)

Use this to add text on the Free Format Text window.

Select **Update (F8)** to update the details and return to the [Installation](#) Equipment Maintenance window.

Meter Reading Entry Window

To display this window, select 6 against a metered [model](#) and then press Enter on the [Installation](#) Equipment Maintenance window.

Fields**Reading Date**

Enter or select the reading date. This field defaults to the current date.

Serv Job No

You can optionally enter the [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Type

Enter the type of reading.

Alternatively, use the prompt facility to select from the Meter Reading Type pop-up.

Reading

Enter the meter reading.

Options**History**

Use this to display the Meter Reading History window.

Meter Reading Maintenance

Use this to display the Meter Reading Maintenance window.

Select **Update (F8)** to update the readings and return to the [Installation](#) Equipment Maintenance window.

Meter Reading History Window

To display this window, select History against a meter on the Meter Reading Entry window.

Select **Previous (F12)** to return to the Meter Reading Entry window.

Meter Reading Maintenance Window

To display this window, select Meter Reading Maintenance against a meter on the Meter Reading Entry window.

Options

Amend Reading

Use this to amend a meter reading.

Delete Reading

Use this to delete a meter reading.

Select **Previous (F12)** to return to the Meter Reading Entry window.

Equipment Detail Maintenance Window

To display this window, enter 1 against a [model](#) and then press Enter on the [Installation](#) Equipment Maintenance window.

Use this window to specify the details of the selected piece of equipment.

Fields

Workshop Location

Enter the [location](#) of the equipment.

Alternatively, use the prompt facility to select from the [Location](#) Selection pop-up.

Owner

Enter the account code and address sequence of the customer who owns the piece of equipment.

Leave this field blank if the [owner](#) is the same as the [site](#) customer code and address sequence already specified.

Equipment Status

Enter a status for the equipment.

Alternatively, use the prompt facility to select from the Equipment Status pop-up.

VAT Calc Basis 1/2/3/4

Enter one of the following to indicate the customer VAT status for invoicing:

1 - If the customer is exempt from VAT

This is for export customers outside the EEC.

2 - To use the entered VAT code for the transaction

3 (default) - To use the specific VAT for the transaction (See VAT derivation rules)

4 – To use the VAT code set up for the final invoice destination

VAT Derivation Rules

Every EQ customer [site](#) has a VAT code

Every EQ machine [Installation](#) has a VAT code and a VAT indicator (VAT Calc basis).

VAT is derived within EQ as follows:

Jobs

For machines with VAT Calc Basis **1** and **2**, the VAT code to be used should be the VAT code entered in the [installation](#) detail.

For VAT Calc Basis **3**, if there are no details found in the override tax code option (maintained in Maintain VAT Code (12/EQP) for Labour, Travel, Mileage and Miscellaneous Charges) then the VAT code used is retrieved from the EQ Customer Additional detail.

VAT basis **4** will use the customer [site](#) VAT code for the invoice posting account. So where there is a different account that is to receive the final invoice their VAT code from the customer detail will be used.

These rules apply to [job](#) invoices but not to Parts transactions. Irrespective of machine VAT settings the Parts transactions follow the normal [sales order processing](#) rules for VAT.

Contracts

Header Priced:

If the [contract](#) is a 'Header priced' [contract](#) then the VAT code is used from the [contract](#) header customer.

If the [contract](#) is header priced and the [contract](#) has a [contract](#) 'bill to' customer set the VAT will still be used from the [contract](#) header customer.

Non-Header Priced:

If the [contract](#) is not set to header pricing, and the [installation](#) VAT indicator is set to **1** or **2** then the VAT code from the [Installation](#) is used.

If the VAT indicator is set to **3** then the VAT used is from the customer [site](#) where the machine is installed.

Vat indicator **4** will mean the VAT code will be taken from the customer [site](#) of the customer who will receive the invoice.

Note: [Installations](#) created via any automatic method will default the VAT indicator onto the [installation](#) from the Sales ledger customer details. Therefore processing for automatic creation of [installations](#) cannot add records with VAT Calculation basis **4**.

VAT Code

Enter the VAT code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

This field defaults from the Maintain Additional Customer Details [task](#).

Warranty Units

Enter the number of warranty units.

Model Year

Enter the year of manufacture of the equipment.

Warranty Mths

Enter the number of months' warranty. This defaults from the warranty months set up for the [model](#).

Warranty Expiry

The warranty expiry date is always calculated by the system using the [installation](#) date plus the warranty months. This field is used during [call](#) logging to determine if the piece of equipment is under warranty or not, on the date on which the [call](#) is taken.

Installation Date

Enter or select the date of [installation](#) of the equipment. The [installation](#) date, plus the warranty months, gives the date when the warranty expires. The date on which the warranty expires is displayed when you enter [job line](#) details.

Delivery Date

Enter or select the delivery date of the equipment.

Department

Enter a department to locate the equipment.

Invoice Number

Enter the number of the [Sales Order Processing](#) invoice.

Location

Enter the [location](#) of the equipment at the customer [site](#). This is displayed on the [Job](#) Details window, used in [call](#) logging and technician work allocation.

Equipment Contact

Enter the name of the person responsible for the equipment.

Technician

Enter a technician.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

If you **check** the Assign [Calls](#) Only to Preferred Technician for the Machine field on the [Company](#) Profile Maintenance [Calls](#) window, during automatic [call](#) allocation, the software allocates this technician to [calls](#) for this equipment.

Points

Enter a number of points used in the calculation of technician work points.

Serviced By Ourselves

This is a memo field.

Use this checkbox as follows:

Unchecked - If a third party services the equipment

Checked - If you service the equipment

Serviced in Workshop

This is a memo field.

Use this checkbox as follows:

Unchecked - If the equipment is not serviced in the workshop

Checked - If the equipment is serviced in the workshop

Functions**Meters (F9)**

Use this to display the Meters Maintenance window on which you can add, update or delete meters for the selected equipment.

Warranty Parts (F10)

Use this to display the Warranty Parts pop-up. Before displaying the pop-up, Equipment Servicing saves any changes made to the equipment details.

Site Addr (F15)

Use this to display the [site](#) name and address on the [Installation](#) Name and Address Detail window.

Owner Addr (F17)

Use this to display the [owner's](#) name and address details on the [Installation](#) Name and Address Detail window.

Ref (F19)

Use this to display the Alternate [Installation](#) References pop-up.

Peripherals (F20)

Use this to enter details of peripherals for this machine. The Peripheral Configuration window is displayed.

Text (F21)

Use this to enter free-format text.

Add Msg (F22)

Use this to enter a machine message. The Send a Machine Message window is displayed.

Rec. Msg (F23)

Use this to display messages for this machine. The Machine Messages pop-up is displayed.

Select **Update (F8)** to save all the details and return to the [Installation](#) Equipment Maintenance window.

Send a Machine Message Window

To display this window, select **Add Msg (F22)** on the Equipment Detail Maintenance window.

Use this window to enter a message about this machine.

Fields

Message From

Enter up to 10 characters to identify the sender by name, by [job](#) title or by user-defined code.

Expiry Date

Enter or select the expiry date of the message. The default is 99/99/99, which means that the message does not expire.

Message

Enter up to three 65-character lines of free-format text.

Send To

Model

Enter the [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial/To

Enter either a single [serial number](#) or a range of [serial numbers](#).

You can use the prompt facility on these fields to select from the Equipment by [Model](#) pop-up.

Note: If the message is for a machine with no [serial number](#), enter the [model](#) and leave the [serial number](#) blank.

Or

Division/Model/Sub-group

Enter a product [division](#), [model](#) and sub-group, to which to send the message. You must enter a [division](#), but [model](#) and sub-group are optional. However, if you enter a sub-group, you must also enter a [model](#).

You can use the prompt facility on this field to select from the [Division](#) Selection, [Model](#) Group Selection and [Model](#) Subgroup Selection pop-ups.

Note: *If you make entries here, you must leave the [Model](#) and Serial fields blank.*

Select **Send Message (F8)** to send the message.

Machine Messages Pop-up

To display this pop-up, select **Rec. Msg (F23)** on the Equipment Detail Maintenance window.

Use this pop-up to view any messages relating to the selected piece of equipment. This pop-up shows:

- The message
- The date and time sent
- Who sent the message

Functions

Remove (F11)

Use this to remove the message.

Press Enter to return to the Equipment Details Maintenance window.

Maintain Division Code [4/EQE]

Use this [task](#) to define and maintain the [divisions](#) for a [model](#) family.

You use [divisions](#), [model](#) groups and [model](#) sub-groups to organise [models](#) into a structured hierarchy within a product. You hold the [contract](#) rates and [scheduled visit profile](#) codes at this level.

You must define [divisions](#), [model](#) groups and [model](#) sub-groups before you can create the [models](#) within them.

Division Maintenance Selection Window

To display this window, select the Maintain [Division](#) Code [task](#).

Use this window to select the [division](#) you want to maintain.

Fields

Division

Enter a [division](#) code to create or maintain.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Select a code or enter a code and then press Enter to display the [Division](#) maintenance window.

Division Maintenance Window

To display this window, select a code or enter a code and then press Enter on the [Division](#) Maintenance Selection window.

Use this window to enter or amend the description.

Fields

Description

Enter or amend the description for the [division](#), using up to 36 alphanumeric characters.

Press Enter to display the [Division](#) Maintenance Details window.

Division Maintenance Details Window

To display this window, press Enter on the [Division](#) Maintenance window.

Use this window to specify the price list and charging information for the selected [division](#).

Fields

Parts Price List

Enter the parts price list to use for this [division](#).

Alternatively, use the prompt facility to select from the Select Price List pop-up.

Labour Price List

Enter the labour price list to use for this [division](#).

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

Note: When Equipment Servicing prices a [job](#), it searches for the labour price list by customer, then [model](#), then [model](#) sub-group, then [model](#) group and finally by [division](#).

Estimate/Quotation Required

This is used as a default during [call](#) logging but you can override it during [call](#) creation. If you choose estimate or [quotation](#), the [job](#) will be created into the [quotation](#) maintenance module.

Select one of the following:

0 - If you do not want either an estimate or [quotation](#)

1 - If you want an estimate

2 - If you want a [quotation](#)

3 - If you want an estimate

4 - If you want a [quotation](#)

Alternatively, use the prompt facility to select from the Estimate Request Type pop-up.

Serial Number Mandatory at Job Creation

Use this checkbox as follows:

Unchecked - If you do not need to enter a [serial number](#) to book a [job](#) for this [division](#)

Checked - If you must specify the equipment's [serial number](#) in order to book a [job](#)

Accessory List Code

Enter the accessory list for this [division](#).

Alternatively, use the prompt facility to select from the Accessory Selection pop-up.

Certification Required

This is a memo field.

Use this checkbox as follows:

Unchecked - If you do not want certification

Checked - If you want certification

% Tolerance for Estimates on Customer Stock

Use this checkbox as follows:

Unchecked - If there is no tolerance on estimates for customer stock

Checked - If there is a tolerance on estimates for customer stock

In this case, enter the percentage value of the tolerance in the Value at this Level field opposite this field.

% Tolerance for Estimates on Own Stock

Use this checkbox as follows:

Unchecked - If there is no tolerance on estimates for your own stock

Checked - If there is a tolerance on estimates for your own stock

In this case, enter the percentage value of the tolerance in the Value at this Level field opposite this field.

Estimate Creation Fee

Use this checkbox as follows:

Unchecked - If there is no fee charged when you create an estimate

Checked - If there is a fee charged when you create an estimate

In this case, enter the fee in the Value at this Level field opposite this field.

Note: *Equipment Servicing applies this fee whenever you cancel a [job](#) for this [division](#), after you have sent an estimate or [quotation](#). You must remove the charge to prevent Workshop from producing an invoice.*

Fixed Price Charge

Use this checkbox as follows:

Unchecked - If you do not have a fixed price for this [division](#)

Checked - If you have a fixed price for this [division](#)

Warranty Months

Use this checkbox as follows:

Unchecked - If there are no warranty months for this [division](#)

Checked - If there are warranty months for this [division](#)

In this case, enter the length of the warranty, in months, in the Value at this Level field opposite this field.

Warranty Claims

Use this checkbox as follows:

Unchecked - If you do not allow warranty claims against this [division](#)

Checked - If you allow warranty claims against this [division](#)

Select **Update (F8)** to save the information and return to the [Division](#) Maintenance Selection window.

Maintain Model Group [5/EQE]

Use this [task](#) to define and maintain the [model](#) groups for a [model](#) family.

You use [divisions](#), [model](#) groups and [model](#) sub-groups to organise [models](#) into a structured hierarchy within a product. You hold the [contract](#) rates, and possibly [scheduled visit profile](#) codes, at this level.

You must define [divisions](#), [model](#) groups and [model](#) sub-groups before you can create the [models](#) within them.

Model Group Maintenance Selection Window

To display this window, select the Maintain [Model](#) Group [task](#).

Use this window to select the [model](#) group.

Fields

Division Code

Enter an existing [division](#) code.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter the [model](#) group, using up to three characters.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Press Enter to display the [Model](#) Group Maintenance window.

Model Group Maintenance Window

To display this window, enter or select a [division](#) code and [model](#) group and then press Enter on the [Model](#) Group Maintenance Selection window.

Use this window to add or amend the description.

Fields

Description

Enter or amend the description, using up to 36 characters.

Press Enter to display the [Model](#) Group Maintenance Details window.

Model Group Maintenance Details Window

To display this window, press Enter on the [Model](#) Group Maintenance window.

Use this window to specify the price list and charging information for the selected [model](#) group.

Fields

Parts Price List

Enter the parts price list to use for this [model](#) group.

Alternatively, use the prompt facility to select from the Select Price List pop-up.

Labour Price List

Enter the labour price list to use for this group.

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

Note: When Equipment Servicing prices a [job](#), it searches for the labour price list by customer, then [model](#), then [model](#) sub-group, then [model](#) group and finally by [division](#).

Estimate/Quotation Required

This is used as a default during [call](#) logging but you can override it during [call](#) creation. If you choose estimate or [quotation](#), the [job](#) will be created into the [quotation](#) maintenance module.

Select one of the following:

0 - If you do not want either an estimate or [quotation](#)

1 - If you want an estimate

2 - If you want a [quotation](#)

3 - If you want an estimate

4 - If you want a [quotation](#)

Alternatively, use the prompt facility to select from the Estimate Request Type pop-up.

Serial Number Mandatory at Job Creation

Use this checkbox as follows:

Unchecked - If you do not need to enter a [serial number](#) to book a [job](#) for this [model](#) group

Checked - If you must specify the equipment's [serial number](#) in order to book a [job](#)

Accessory List Code

Enter the accessory list for this [model](#) group.

Alternatively, use the prompt facility to select from the Accessory Selection pop-up.

Certification Required

This is a memo field.

Use this checkbox as follows:

Unchecked - If you do not want certification

Checked - If you want certification

% Tolerance for Estimates on Customer Stock

Use this checkbox as follows:

Unchecked - If there is no tolerance on estimates for customer stock

Checked - If there is a tolerance on estimates for customer stock

In this case, enter the percentage value of the tolerance in the Value at this Level field opposite this field.

% Tolerance for Estimates on Own Stock

Use this checkbox as follows:

Unchecked - If there is no tolerance on estimates for your own stock

Checked - If there is a tolerance on estimates for your own stock

In this case, enter the percentage value of the tolerance in the Value at this Level field opposite this field.

Estimate Creation Fee

Use this checkbox as follows:

Unchecked - If there is no fee charged when you create an estimate

Checked - If there is a fee charged when you create an estimate

In this case, enter the fee in the Value at this Level field opposite this field.

Note: *Equipment Servicing applies this fee whenever you cancel a [job](#) for this [model](#) group, after you have sent an estimate or [quotation](#). You must remove the charge to prevent Workshop from producing an invoice.*

Fixed Price Charge

Use this checkbox as follows:

Unchecked - If you do not have a fixed price for this [model](#) group

Checked - If you have a fixed price for this [model](#) group

Warranty Months

Use this checkbox as follows:

Unchecked - If there are no warranty months for this [model](#) group

Checked - If there are warranty months for this [model](#) group

In this case, enter the length of the warranty, in months, in the Value at this Level field opposite this field.

Warranty Claims

Use this checkbox as follows:

Unchecked - If you do not allow warranty claims against this [model](#) group

Checked - If you allow warranty claims against this [model](#) group

Select **Update (F8)** to save the information and return to the [Model](#) Group Maintenance Selection window.

Maintain Model Sub-group [6/EQE]

Use this [task](#) to define and maintain the [model](#) sub-groups for a [model](#) family.

You use [divisions](#), [model](#) groups and [model](#) sub-groups to organise [models](#) into a structured hierarchy within a product. You hold the [contract](#) rates, and possibly [scheduled visit profile](#) codes, at this level.

You must define [divisions](#), [model](#) groups and [model](#) sub-groups before you can create the [models](#) within them.

Model Sub-Group Maintenance Selection Window

To display this window, select the Maintain [Model](#) Sub-group [task](#).

Use this window to select or enter the [model](#) sub-group you want to maintain or define.

Fields

Division

Enter an existing [division](#) code.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter an existing [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Model Sub-group

Enter the [model](#) sub-group, using up to three characters.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

Press Enter to display the [Model](#) Sub-group Maintenance window.

Model Sub-group Maintenance Window

To display this window, enter or select a [division](#), [model](#) group and [model](#) sub-group and then press Enter on the [Model](#) Sub-group Maintenance Selection window.

Use this window to enter the description of the [model](#) sub-group.

Fields

Description (Untitled)

Enter a description for the [model](#) sub-group, using up to 20 alphanumeric characters.

Press Enter to display the [Model](#) Sub-Group Maintenance Details window.

Model Sub-Group Maintenance Details Window

To display this window, press Enter on the [Model](#) Sub-Group Maintenance window.

Use this window to specify the price list and charging information for the selected [model](#) sub-group.

Fields

Parts Price List

Enter the parts price list to use for this [model](#) sub-group.

Alternatively, use the prompt facility to select from the Select Price List pop-up.

Labour Price List

Enter the labour price list to use for this sub-group.

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

Note: When Equipment Servicing prices a [job](#), it searches for the labour price list by customer, then [model](#), then [model](#) sub-group, then [model](#) group and finally by [division](#).

Estimate/Quotation Required

This is used as a default during [call](#) logging but you can override it during [call](#) creation. If you choose estimate or [quotation](#), the [job](#) will be created into the [quotation](#) maintenance module.

Select one of the following:

- 0 - If you do not want either an estimate or [quotation](#)
- 1 - If you want an estimate
- 2 - If you want a [quotation](#)
- 3 - If you want an estimate
- 4 - If you want a [quotation](#)

Alternatively, use the prompt facility to select from the Estimate Request Type pop-up.

Serial Number Mandatory at Job Creation

Use this checkbox as follows:

Unchecked - If you do not need to enter a [serial number](#) to book a [job](#) for this [model](#) sub-group

Checked - If you must specify the equipment's [serial number](#) in order to book a [job](#)

Accessory List Code

Enter the accessory list for this [model](#) sub-group.

Alternatively, use the prompt facility to select from the Accessory Selection pop-up.

Certification Required

This is a memo field.

Use this checkbox as follows:

Unchecked - If you do not want certification

Checked - If you want certification

% Tolerance for Estimates on Customer Stock

Use this checkbox as follows:

Unchecked - If there is no tolerance on estimates for customer stock

Checked - If there is a tolerance on estimates for customer stock

In this case, enter the percentage value of the tolerance in the Value at this Level field opposite this field.

% Tolerance for Estimates on Own Stock

Use this checkbox as follows:

Unchecked - If there is no tolerance on estimates for your own stock

Checked - If there is a tolerance on estimates for your own stock

In this case, enter the percentage value of the tolerance in the Value at this Level field opposite this field.

Estimate Creation Fee

Use this checkbox as follows:

Unchecked - If there is no fee charged when you create an estimate

Checked - If there is a fee charged when you create an estimate

In this case, enter the fee in the Value at this Level field opposite this field.

Note: *Equipment Servicing applies this fee whenever you cancel a [job](#) for this [model](#) sub-group, after you have sent an estimate or [quotation](#). You must remove the charge to prevent Workshop from producing an invoice.*

Fixed Price Charge

Use this checkbox as follows:

Unchecked - If you do not have a fixed price for this [model](#) sub-group

Checked - If you have a fixed price for this [model](#) sub-group

Warranty Months

Use this checkbox as follows:

Unchecked - If there are no warranty months for this [model](#) sub-group

Checked - If there are warranty months for this [model](#) sub-group

In this case, enter the length of the warranty, in months, in the Value at this Level field opposite this field.

Warranty Claims

Use this checkbox as follows:

Unchecked - If you do not allow warranty claims against this [model](#) sub-group

Checked - If you allow warranty claims against this [model](#) sub-group

Select **Update (F8)** to save the information and return to the [Model](#) Sub-group Maintenance Selection window.

Maintain Equipment Movement [7/EQE]

Use this [task](#) to transfer one or more pieces of equipment from one [installation address](#) to another, for the same or a different account and to the same or a different [branch](#).

You can also change the [ownership](#) of a piece of equipment.

Equipment Servicing transfers the equipment immediately. You move the equipment to the administrative [branch](#), defined on the additional service details, of the [site](#) receiving the equipment.

Implications

You cannot transfer equipment if any of the following apply:

- It is currently active on a [service contract](#)
- It has any incomplete [jobs](#) on it
- It has any invoices pending generation
- The [owner](#) is not the customer account (you have specified an override)

If you are transferring more than one piece of equipment, and have specified an override [owner](#) on any of that equipment, Equipment Servicing suspends the transfer of all the equipment.

Note: *Equipment Servicing flags a completed [job](#) for pricing and invoicing, even if it has no chargeable elements. These routines also perform the [costing](#), calculate response times and transfer the [job](#) to the history file.*

Equipment Movement Maintenance Selection Window

To display this window, select the Maintain Equipment Movement [task](#).

Use this window to select either the customer or [model](#) you want to move.

Fields

Model

Enter a [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial Number

If you entered a [model](#), enter the [serial number](#) of the equipment to transfer.

Note: If there is no equipment, enter an account in order to switch the search to customer.

Account Number

Enter the customer whose equipment you want to transfer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Account Address

If you entered an account number, enter the account address sequence.

Note: The administrative [branch](#) of this account must be the [branch](#) you are currently using.

Enter the selection details and then press Enter to display the Equipment Selection window.

Equipment Selection Window

To display this window, enter the selection details and then press Enter on the Equipment Movement Maintenance Selection window.

If you entered a [model](#) on the Equipment Movement Maintenance Selection window, this window lists all the equipment for that [model](#).

If you entered the account number and address sequence on the Equipment Movement Maintenance Selection window, this window lists all the equipment for that [location](#).

Note: If, instead of a [serial number](#), the window shows a quantity (Qty), there is at least one piece of equipment for that [model](#) without a specific [serial number](#).

Options

Select

Use this to transfer a single piece of equipment. The Move Single Piece of Equipment window is displayed.

Functions

Transfer All (F7)

This is only displayed if you entered a customer on the Equipment Movement Maintenance Selection window. Use this to transfer every piece of equipment listed to another [site](#). The Move All Equipment window is displayed.

Select the required equipment and then press Enter to display the Move Single Piece of Equipment window.

Move All Equipment Window

To display this window, select **Transfer All (F7)** on the Equipment Selection window.

Use this window to move all the equipment to an account you specify.

Note: The equipment cannot be on a [service contract](#) or owned by an override [owner](#).

Fields

New Account Number

Enter the customer account to which to move the equipment.

Account Address

Enter the address sequence to which to move the equipment.

Note: The admin [branch](#) for this [site](#) determines the [branch](#) to which Equipment Servicing moves the equipment.

Specify the account to which to move the equipment and then select **Update (F8)** to transfer all the equipment.

Move Single Piece of Equipment Window

To display this window, select a single item of equipment on the Equipment Selection window.

Use this window to enter the new [location](#) details for the equipment.

Fields

Owner

Enter the [owner's](#) name and address sequence. This defaults from the [installation](#) information.

Department

Enter the department. This defaults from the [installation](#) information.

Location

Enter the [location](#). This defaults from the [installation](#) information.

Equipment Contact

Enter the person responsible for the equipment. This defaults to the equipment contact from the [installation](#) information for the machine.

New Account Number

Enter an account to which to move the equipment.

New Account Address

Enter an address sequence to which to move the equipment.

Note: The administrative [branch](#) in the new [site's](#) additional details is the equipment's new [branch](#).

Select **Update (F8)** to transfer the equipment.

Maintain Volume Segment [8/EQE]

Use this [task](#) to categorise the usage volume for equipment at [model](#) level and to set the basis for repeat [call](#) calculations.

Concepts

Equipment usage volume influences both the response time for [calls](#) and the calculation which determines if a subsequent [call](#) is a repeat [call](#).

You define the volume segment code within the range 01 (low) to 99 (high). It is one of the factors Equipment Servicing uses to calculate a reduction in response times; the other factors are customer priority and whether the machine is working.

A repeat [call](#) may depend on volume throughput or the number of days between [visits](#). Whether a [call](#) is a repeat or not affects the default [job category](#) displayed on the [Job](#) Details window.

Note: You must set up at least one volume segment code. The code is a mandatory field on [models](#) because Equipment Servicing uses it to calculate response times.

Volume Segment Maintenance Selection Window

To display this window, select the Maintain Volume Segment [task](#).

Use this window to enter or select the volume segment you want to maintain or add.

Fields

Volume Segment

Enter a new or existing numeric code to add or amend the volume segment.

Alternatively, use the prompt facility to select from the Volume Segments pop-up.

Select a code or enter a code and then press Enter to display the Volume Segment Detail Maintenance window.

Volume Segment Maintenance Detail Window

To display this window, select a code or enter a code and then press Enter on the Volume Segment Maintenance Selection window.

Use this window to define or maintain the Volume Segment Maintenance details.

Fields

Description

Enter a description for the volume segment.

Minimum Unit Volume per Month

Enter the minimum unit volume per month. You cannot enter decimals.

Maximum Unit Volume per Month

Enter the maximum unit volume per month. You cannot enter decimals.

Average Unit Volume per Month

Enter the average copy volume per month. You cannot enter decimals. Equipment Servicing uses this in [contract](#) invoicing, if the actual volume data is not available, to calculate the daily average for unit estimates.

Volume Band Width

Enter the volume band width. You cannot enter decimals.

Volume between Calls

This is the volume field that you can use when calculating a repeat [call](#). Enter up to 9 numeric characters. You cannot enter decimals.

Note: *If you only use time to calculate repeat [calls](#), leave this field at zero.*

No of Days between Calls

This is the time field that you can use when calculating a repeat [call](#). Enter the number of days, in the range 0 to 999.

Note: *Leave this field at zero if you only use volume to calculate repeat [calls](#).*

Both Tim/Vol Used in Repeat Calc

Use this checkbox as follows:

Unchecked - If you use either time or volume, but not both, in the repeat [call](#) calculation

Checked - If you use both time and volume in the repeat [call](#) calculation

In this case, you must enter a value greater than 0 in both the Volume between [Calls](#) and the No. of Days between [Calls](#) fields.

Meter Unit Tolerance %

The tolerance % is used to identify scheduled [visits](#) that may be brought forward if they are within the specified tolerance %.

Example

Equipment X had an initial reading of 400 when it started on the [contract](#).

Period of Visit	Job Cat	No of Hours
0518	VI1	250
0522	VI2	500
0526	VI3	750

0530

VI4

1000

The current period is 0517.

Run planned maintenance [visit](#) load for periods 0518 to 0519.

Examine [visit](#) 0522.

Run an estimate for the date of the last day of period 0519.

If the estimated reading is 499 or less, there is no change.

If the estimated reading is 500 or above, change the period of [visit](#) to 0519.

Also change the 0526 [visit](#) to 0523 and the 0530 [visit](#) to 0527.

Therefore, in the example above, if the estimated reading was 470 instead of 500 and the tolerance was 30% the scheduled [visits](#) would still be changed.

Select **Update (F8)** to save any changes.

Maintain Zone Charges [9/EQE]

If you want to charge travel distance by mileage zones (see the [Company](#) Profile Maintenance Planning Window section in the [Company](#) Parameters Maintenance chapter of this product guide), you must set up a zone charge that holds the zone description, the charge and an effectivity date.

You only need to set up zone charges if you want to charge distance travelled by zone, by [company](#) or [branch](#) default, or selectively for specific [sites](#).

You specify in the customer's additional details whether you use a zone charge to charge travel distance, and if so which zone charge applies.

You can group customer [sites](#) in these user-defined zones, so that you can impose a travel charge for each [call](#) made to a customer's [site](#) wherever it is within that zone.

You set up the zone charge description in the Maintain Codes/Parameters [task](#), under type ZONE.

The actual zone charge is [branch](#)-specific. This means that [branches](#) can set their own charge for a particular zone description (for example, the inner city zone may be charged at 5.00 at one [branch](#), but at 7.50 at another).

Zone Charges Maintenance Initial Window

To display this window select the Maintain Zone Charges [task](#).

Fields

Zone

Enter a new or existing zone code.

Alternatively, use the prompt facility to select from the Zone Charge Description pop-up.

Currency Code

Enter the currency in which this zone is charged.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Enter a zone and currency code and then press Enter to display the Zone Charges Maintenance Detail window.

Zone Charges Maintenance Detail Window

To display this window, enter a zone and currency code and then press Enter on the Zone Charges Maintenance Initial window.

Fields

Select

Select one of the following:

Select (1) (default) - To change the charge details

Delete 5) - To delete the charge details

This only available if the charge's effective date is later than the system date.

Note: The zone charge will be applied by [job pricing](#) to a customer's [call](#) if the Charge Zones field is checked in the Maintain Additional Customer Details [task](#) and mileage is chargeable on the [cover type/job category](#) for the [call](#).

Description

Enter the zone [charge code](#) description.

The [company](#)-specific description is held in the Codes/Parameters file under type ZONE.

Zone Charge

Enter the [branch](#)-specific zone charge.

You cannot amend the current zone charge; instead you must create a new charge with a different effective date.

Effective Date

Enter or select the date on which the zone charge is to become effective in the format DDMMYY.

If the effective date of an existing charge is earlier than or the same as the system date, you cannot change it, because it is the current charge. You must instead create a new charge with a different effective date.

Select **Update (F8)** to update the file and return to the Zone Charges Maintenance Initial window.

Maintain Accessory Code [12/EQE]

Use this [task](#) to maintain lists of standard accessories.

Note: *The items you add to the accessory list must be valid Inventory items.*

You can specify which accessory list a [model](#) uses. When you book that [model](#) into the workshop, Equipment Servicing looks at the accessory list, and, if it identifies any item on the list as Supply Required, warns you that you should not process the [job](#) any further until you receive the accessory.

Accessories Code Maintenance Selection Window

To display this window, select the Maintain Accessory Code [task](#).

Use this window to select or enter the accessory list you want to maintain.

Fields

Accessory Code

Enter an accessory code, using up to three alphanumeric characters.

Alternatively, use the prompt facility to select from the Accessory Selection pop-up.

Note: *When you change an accessory list, Equipment Servicing does not update workshop [jobs](#) with the accessory list attached. The [jobs](#) complete using the accessory list attached when you created the [job](#).*

Select an accessory code or enter an accessory code and then press Enter code to display the Accessories Code Maintenance Details window.

Accessories Code Maintenance Details Window

To display this window, select an accessory code or enter an accessory code and then press Enter on the Accessories Code Maintenance Selection window.

Use this window to define the items on the accessory list.

Fields

Accessory Code Description (Untitled)

Enter a description for the accessory list.

Accessory

Enter a valid inventory item.

Supp Reqd

Enter one of the following:

0 - If you do not need this item when you create a [job](#) for a [model](#) with this accessory list attached

1 - If you need this item when you create a [job](#) for a [model](#) with this accessory list attached

Qty

Enter the number of items required per [model](#). You cannot enter decimals.

Select **Update (F8)** to save the information and return to the Accessories Code Maintenance Selection window.

Maintain Model/Parts Relationship [13/EQE]

Use this [task](#) to define the parts that can be used for specific machines in the [model](#) hierarchy.

Note: If you do not set up a [model](#) and parts relationship using this [task](#), Equipment Servicing presumes that any part can be used against any [model](#).

The access logic for the parts hierarchy is as follows.

For all hierarchy levels starting with the [model](#) and then working up:

See if there is a list for the hierarchy key.

If not, go up the hierarchy and if there is still no list by [division](#), all Inventory parts are allowed.

If there is a list and the part is not there, check any record on the list to see if it has include or exclude set.

If the flag is **Exclude**, the part is valid.

If the flag is **Include**, the part is not valid.

Model/Parts Relationship Initial Window

To display this window, select the Maintain [Model/Parts Relationship](#) [task](#).

Use this window to select the level at which to enter the [parts list](#).

Fields

Division

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

If this is entered, the [division](#) also needs to be entered. The [model](#) group must exist for the [division](#).

Model Sub Group

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

If this is entered, the [division](#) and [model](#) group also need to be entered. The [model](#) sub-group must exist in a hierarchy of the [division](#) and [model](#) group entered.

Model Number

Enter the [model](#) required.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

This [model](#) must exist in the [Model](#) Master file.

Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Include/Exclude

Use this checkbox as follows:

Unchecked - If exclude is selected, parts cannot be used within the [model](#) hierarchy selected

Checked - If include is selected, the parts can be added onto a [parts list](#) for a [model](#) within the selected hierarchy

Press Enter to display the [Model](#)/Parts Relationship Parts window.

Model/Parts Relationship Parts Window

To display this window, press Enter on the [Model](#)/Parts Relationship Maintenance Initial window.

If the Include/Exclude field was **checked** on the [Model](#)/Parts Relationship Maintenance Initial window, the literal **INCLUDE** is shown at the top of this window. If it was left **unchecked**, the literal **EXCLUDE** is shown.

Fields

Part Number

Enter the part number you want to add to the relationship list.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Quantity

Enter the quantity of the part that can be issued to a machine.

If the quantity is left as zero, it will default to **1** and any quantity can be used on the Parts window.

UOM

Enter the unit of measure of the part.

Start Date

Enter or select the date on which the part may start being used or excluded from the machine hierarchy. This defaults to the current date.

Expiry Date

Enter or select the date on which the part stops being available to or excluded from the machine hierarchy. If this date is left blank, it defaults to 99/99/99, i.e. the part will remain valid forever.

Options**Select**

Use this to change the part details.

Delete

Use this to delete the part details.

Press Enter to update the window and then select **Previous (F12)** to return to the [Model/Parts Relationship](#) initial window.

Maintain Customer PO Mask [14/EQE]

Use this [task](#) to define the format of the customer order number entered.

Note: *If you do not set up a customer purchase order mask using this [task](#), Equipment Servicing presumes that any order reference entered is valid.*

Customer PO Mask Maintenance Selection Window

To display this window, select the Maintain Customer PO Mask [task](#).

Use this window to set up the valid format of the customer order number.

Fields**Account Number**

Enter an existing customer account.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Account Location

Enter an existing [location](#) sequence.

Enter or select a customer account and [location](#) sequence and then press Enter to display the Customer PO Mask Detail window.

Customer PO Mask Detail Window

To display this window, enter or select a valid customer account and [location](#) sequence and then press Enter on the Customer PO Mask Maintenance Selection window.

Use this window to set up the valid format of the customer order number.

Fields

Index (Untitled)

Enter a position within the customer order number for validation.

Customer PO Mask (Untitled)

Enter the validation character(s).

For example:

If you enter **1** in the Index field and **N** in the Customer PO Mask field, within [call](#) logging the customer order number entered will be flagged as being in error if it does not start with N.

Options

Amend

Use this to change the mask. The Amend Record pop-up is displayed.

Copy

Use this to copy the entered mask to a different customer, [location](#) and index position. The Copy Record pop-up is displayed.

Delete

Use this to delete the details. You must confirm the deletion on the Delete Record pop-up.

Display

Use this to view details of the entry on the Display Details pop-up, including the user ID and the date and time at which the mask was created.

Enter an index and a customer purchase order mask and then press Enter to add the details. Select **Exit (F3)** to leave the [task](#).

SOP Transfer to EQ [50/EQE]

This [task](#) stores the details of equipment sold through [Sales Order Processing](#) and delivered to customers as equipment installed in Equipment Servicing. You can hold and issue machines sold from an inventory stockroom or a warehouse.

The [task](#) also generates an [installation job](#), with the default [installation job category](#), if you require a technician for the machine's [installation](#).

Description

This is a batch [job](#), which you run on demand. It selects equipment despatched in [Sales Order Processing](#), if the sales order item number matches an Equipment Servicing [model](#) file record containing that item number. The [job](#) writes details of the [model](#), [serial number](#), delivery date, etc. to the Equipment Servicing Installed Equipment file for the [delivery address](#) on the [Sales Order Processing](#) order.

If the additional customer details for the [site](#) do not exist, Equipment Servicing writes a record from the [Sales Order Processing](#) order data and the [site's](#) additional sales details. This includes the definition of the Equipment Servicing [branch](#).

Note: For full details of the SOP processing involved in the sale of the equipment, see the [Sales Order Processing](#) product guide.

Implications

The transfer process does not cover the configuration of peripheral devices to the prime machine.

You must manually link the peripherals to the prime machine after the technician has completed the [installation](#). The technician can then confirm which peripherals belong to which machine.

Make sure that the Codes/Parameters File, parameter type STAT, has a record X [Sales Order Processing](#) Sale: SS Record Required. The equipment [installation](#) record, created by the [Sales Order Processing](#) sale, displays X in the Equipment Status field. You can leave this value unchanged, or amend it, when you complete the [installation](#) after the [Sales Order Processing](#) transfer.

The test data includes a [job category](#) record for the default [installation job](#). You must set this up correctly for live running to ensure the [installation job](#) includes the [job category](#) and fault codes (INS, [Installation](#),4,2,1,1,*blank). You should set up a record INS, [Installation](#): [Sales Order Processing](#) machine, in the Codes/Parameters file, under parameter type FLTC.

This INS [job](#) should also be entered in the Maintain Reporting Hierarchy and the Maintain [Model/Rep. Hierarchy Relationship](#) [tasks](#).

If a [job](#) template exists for the [installation job](#), this [task](#) will [call](#) the template creation and the full [job](#) structure will be created.

Select **Confirm Submit (F8)** to run the batch [job](#).

Chapter 5 Contracts Database

Maintain Contracts [1/EQC]

Use this [task](#) to set up and maintain the details of all your equipment servicing [contracts](#) and [quotations](#) for [contracts](#).

You can use this [task](#) on a regular basis to add, amend or delete [contracts](#) and [quotations](#).

Contracts

A [contract](#) describes the [terms](#) of maintenance for one or more pieces of equipment installed at one or more of a customer's [sites](#).

A [contract](#) has a start date and normally an end date, although it can be a never-ending [contract](#). Each piece of equipment covered by a [contract](#) has an inclusion date (which can be later than the [contract](#) start date) and may have a removal date (if it is removed from the [contract](#) before the [contract](#) end date).

A [contract](#) is uniquely identified by the combination of the [contract](#) number, [contract type](#), and start date.

A [contract](#) consists of a number of components:

- [Contract](#) header
 - This specifies the [terms](#) for the [contract](#).
- [Contract](#) equipment
 - This lists the pieces of equipment covered.
- Maintenance [visit](#) schedule
 - This is the schedule, by [service period](#), of planned maintenance [visits](#).

A [special price](#) can be defined for any piece of equipment on a [contract](#), this price overriding the standard price calculated by the software.

New [contracts](#) have a status of Pending Start Date. This status is changed to Active when you run either the Day End Routines [task](#) or the Update [Contract task](#), provided that the [contract's](#) start date has been reached.

[Contract quotations](#) are created in exactly the same way as true [contracts](#), but are given [quotation](#) status by means of [Quotation Only/Accept Contract \(F22\)](#). The same function is used to convert the [quotation](#) into a true [contract](#) when the customer accepts the [quotation](#).

Contract Maintenance Initial Window

To display this window, select the Maintain [Contracts task](#).

You can do two things from this window.

- You can select the [contract](#) you want to maintain.
- You can enter a customer and [site](#), and either set up a new [contract](#) for that [site](#), or maintain an existing one.

Fields

Contract Number

If you enter a [contract](#) number and no account code or address sequence, the [contract](#) must already exist in the software.

If you enter a [contract](#) number by itself and then press Enter, the software displays a list of all [contracts](#) with this [contract](#) number, in [contract type](#) and start date sequence.

Contract Type

Enter an existing [contract type](#).

Alternatively, use the prompt facility to select from the [Contract Type Selection](#) pop-up.

You must also enter a [contract](#) number. If you do not enter an account and address, the [contract](#) and type combination must already exist.

If you enter only a [contract](#) number and a type, press Enter to display all relevant [contracts](#) in start date sequence.

Account Number

Enter an existing customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If you press Enter, the software displays a list of all the address sequences for this customer.

If you then select an address sequence, you will see a list of all [contracts](#) for this customer and address sequence, in [contract type](#) and start date sequence.

Account Address

Enter an address sequence in conjunction with a customer. This combination must already exist.

If you only enter a customer and address sequence, press Enter to display all [contracts](#) in [contract type](#) and start date sequence.

Press Enter.

If you are setting up a new [contract](#) and you have completed all four input fields, the [Contract Header Maintenance](#) window will be displayed.

Otherwise, the [Contract Selection](#) window will be displayed.

Contract Selection Window

To display this window, press Enter on the [Contract](#) Maintenance Initial window.

Use this window either to select an existing [contract](#) for maintenance, or to enter a [contract type](#) and start date to set up a new [contract](#).

Fields

Contract No.

To maintain an existing [contract](#), enter the number of the [contract](#).

To set up a new [contract](#), leave this field blank and enter the [contract type](#) and date, and the software will generate a new [contract](#) number.

This field defaults to the specific [contract](#) number you entered (if any) on the [Contract](#) Maintenance Initial window.

Type

Enter the [contract type](#) of the [contract](#) to be maintained or set up.

This field defaults to the type you entered (if any) on the [Contract](#) Maintenance Initial window.

You can use the prompt facility on this field to select from the [Contract Type](#) Selection pop-up.

Contract Start Date

Enter or select the [contract](#) start date of the [contract](#) to be maintained or set up.

Options

Select

Use this to display the [Contract](#) Equipment Maintenance Detail window for the selected [contract](#). This is the default option.

Press Enter.

If you selected an existing [contract](#), the [Contract](#) Equipment Maintenance Detail window will be displayed.

If you entered a new [contract](#), the [Contract](#) Header Maintenance window will be displayed.

Contract Header Maintenance Window

To display this window, if you are adding a new [contract](#), enter the [contract type](#) and start date on the [Contract](#) Selection window.

Alternatively, if you are adding a new [contract](#), enter the [contract](#) number, type, account and [location](#) and then press Enter on the [Contract](#) Maintenance Initial window.

Alternatively, if you are maintaining an existing [contract](#), select **Previous (F12)** on the [Contract](#) Equipment Maintenance Detail window.

Fields

Alt. Cont. No

Enter up to seven alphanumeric characters for an alternative [contract](#) number.

Version

Enter up to five alphanumeric characters for a version number.

Contract Type

Enter an existing [contract type](#). You can only amend this when the [contract](#) has a status of Pending Start Date.

This is a key field in controlling your [contracts](#). If you are not familiar with the concept of [contract types](#), see the Maintain [Contract Type](#) section of this product guide.

Status

This field displays the [contract's](#) status. It is system-maintained and the description is retrieved from the Codes/Parameters file, type CHST.

The status can be:

P - Pending Start Date

Q - [Quotation](#)

A - Active

E - Expired

D - Deleted

Contract Start Date

Enter or select the start date for the [contract](#). You can only change this when the [contract](#) status is Pending Start Date. The [contract](#) will be made active by the Day End Routines [task](#) when the start date is reached.

You can backdate a [contract](#).

End Date

Enter or select the date on which the [contract](#) is to end. If you leave this field blank, the software will calculate it as the start date plus the [contract](#) duration.

If the [contract](#) duration is zero, the software will make this a rolling [contract](#) with an end date of 99/99/99.

If you overwrite the original end date with an earlier date, the software assumes that the [contract](#) is ending early.

The Update [Contract](#) and [Contract](#) Credit Selection [tasks](#) use this date as the basis for calculating any credits that may be due.

Invoice Start

This field displays the date on which the first invoice for the [contract](#) was raised.

Calendar Code

If you want to associate this [contract](#) with a calendar, enter that calendar here.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

If you want to associate individual machines with calendars, you can do that within this [task](#), on the [Contract](#) Equipment Maintenance Detail window.

Tot Contract Value

This field displays the total value of the fixed service charges that you entered on the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up for each piece of equipment. It is the annualised, or [term's](#), nominal value of the service elements of a [contract](#).

This value will be zero before the [contract](#) start date, or the effective date(s) for the equipment prices.

The total does not necessarily reflect the invoice value of the [contract](#) if equipment is added or deleted during the course of the [billing term](#).

This field is not used for pricing or invoicing the [contract](#) if header pricing applies.

Note: *Re-value (F5) updates this field's value.*

Header Price

This displays the header, or block, price for the [contract](#), as entered on the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up (**Conditions Maintenance (F18)**). This is the price that will be invoiced for the [contract term](#).

The field is only displayed if the Header Level Pricing field on this window is **checked**.

Duration

Enter the [contract](#) duration, in months, up to a maximum of 120.

The initial value defaults from the [contract type](#). You can only change this field if the [contract](#) status is Pending Start Date.

If the duration is zero, the software assumes it is a rolling or never-ending [contract](#), with an end date of 99/99/99.

Mantle Code

Enter an existing mantle code of up to five alphanumeric characters.

Alternatively, use the prompt facility to select from the MANT SS/V3 Mantle Groupings pop-up.

The mantle code is used in the Global Price Update [task](#), to identify a group of [contracts](#) for a percentage price change.

Customer Order Ref 1

This field and the Order Ref Date field are mandatory if the Customer Ref for [Contracts](#) field in the Maintain Additional Customer Details [task](#) is **checked**.

Enter up to 20 alphanumeric characters as the customer's order reference.

Order Ref Date

This field and the Customer Order Ref 1 field are mandatory if the Customer Ref. for [Contracts](#) field in the Maintain Additional Customer Details [task](#) is **checked**.

Enter or select a valid date (format DDMMYY) for the customer's order.

Customer Contact

Enter the name of the contact to whom enquiries relating to this [contract](#) should be addressed. This field defaults to the contact entered in the Contact field in the Maintain Additional Customer Details [task](#).

Telephone No

Enter the telephone number to which enquiries relating to this [contract](#) should be directed. This field defaults to the telephone number entered in the Service Telephone Number field in the Maintain Additional Customer Details [task](#).

Renew Contract

Use this checkbox as follows:

Unchecked - If the [contract](#) will never be renewed

Checked - If the [contract](#) will be renewed with effect from the end date on the [contract](#) header

Note: This indicator has no effect if the [contract](#) end date is set to 99/99/99 (a rolling or never-ending [contract](#)).

Region

This field displays the customer's region. You set this up in the Region field in the Maintain Additional Customer Details [task](#).

Non-posting Invoices

Enter one of the following:

0 - If invoices produced for the [contract](#) will be posted to [Accounts Receivable](#) and the [General Ledger](#)

1 - If the [contract](#) will function as normal, but invoices produced will stay within Service Management and will not be posted to [Accounts Receivable](#) or the [General Ledger](#)

Header Level Pricing

Use this checkbox as follows:

Unchecked - If you want to be able to price pieces of equipment individually

If you do not select **Conditions Maint (F18)** to enter a price on the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up, the software takes the [contract](#) price from the [Contract](#) Rates file for each piece of equipment.

If you do select **Conditions Maint (F18)** and you enter a price on the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up, that price defaults to each [Contract](#) Header Maintenance [Contract Conditions](#) pop-up for each piece of equipment, but you can change this for each individual piece of equipment.

Checked - If you want to define your pricing at header level rather than for each individual piece of equipment

You must select **Conditions Maint (F18)** and complete the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up before you can update the [contract](#) header. Enter only a fixed service charge. The software will price the [contract](#) based on that price. The software will ignore any prices you enter on the [Contract](#) Header [Contract Conditions](#) pop-up for individual pieces of equipment. These prices will be used only for comparison purposes: their total is displayed in the Tot [Contract](#) Value field.

If the [contract](#) is header priced, the initial creation of the [contract](#) should be for a dummy machine which should be priced prior to the addition of the 'real' equipment. The dummy machine will be the only one that appears on the printed invoice, as, with header pricing, the whole list of machines is not shown.

The following fields will only be visible if the [contract](#) has meterage billing types specified:

Estimates Allowed

This field defaults from the Maintain [Company](#) Profile [task](#).

Use this checkbox as follows:

Unchecked - If you are not using estimated meter readings

Checked - If you want to produce invoices based on estimated meter readings

No of Estimates Allowed

Enter the number of consecutive estimates that are allowed for billing. Valid entries are from 1 to 999.

Contract Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used when billing the transactions for this [contract](#); it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task](#)/ Document type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Visit Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used when billing the service [visits](#) associated to this [contract](#); it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task/ Document](#) type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Pool Contract

This is only valid for [contracts](#) which have meterage billing parameters defined on the [contract type](#). Pooling meterage prices means that you can spread minimum volumes or charges across equipment, allowing the excess units on one machine to be offset against the under-usage on another machine.

Use this checkbox as follows:

Unchecked - If the [contract](#) is non-pooled

Non-pooled [contracts](#) are assessed for invoicing on the basis of the individual machine. If the number of copies or vends is less than the minimum, the charge is for the minimum number. If the number exceeds the minimum, the additional copies or vends are charged.

Checked - If the [contract](#) is pooled

Pooled [contracts](#) are assessed for invoicing on the basis of the aggregated minima of all the machines on the [contract](#). That is, machines which have an excess of copies or vends can offset the total excess against those machines which have actual usage which is less than the minimum.

Note: *Pooling applies to meter 1 only.*

Tile Contract

This is only valid for [contracts](#) which have meterage billing parameters defined on the [contract type](#).

Enter one of the following:

Unchecked - If the [contract](#) is non-tiled

Checked - If the [contract](#) is tiled

Tiled [contracts](#) are a special form of pooled [contract](#). You can only use tiling if you are using pooling. Unlike pooled [contracts](#), which have a defined [termination](#) date, tiled [contracts](#) allow the [termination](#) date to be extended for each new item of equipment added to the [contract](#). The new [termination](#) date is calculated by adding the [contract term](#) to the inclusion date of the machine which has been added.

Copy-kit

Enter one of the following:

Unchecked - If this [contract](#) is not a copy-kit [contract](#)

Checked - If you want to be able to provide service and materials for either a pre-defined period of time, or a pre-defined number of copies, whichever runs out first

This is [called](#) a copy-kit [contract](#).

This field only appears if you selected one of the copy fields on the [contract type](#).

Salesman Code

Enter an existing salesman.

Alternatively, use the prompt facility to select from the TN Salesman pop-up.

The salesman is used for memo purposes only.

Direct Debit

This field is for future development.

Invoice Summ/Det Form

This field is for future development.

Header Currency

Use this checkbox as follows:

Unchecked - If you want to invoice the equipment on the [contract](#) in the currency of the [site](#) where the equipment is installed

Checked - If you want to invoice all equipment on the [contract](#) in the currency of the account on the [contract](#) header

Invoice Destination

Enter the customer's account. This field has a default value, but can be changed to any existing account.

Invoice Address Sequence (Untitled)

Enter a valid address sequence for the corresponding customer.

This indicates the address that will be printed on all invoices and credit notes for the [contract](#).

Labour Price List

Enter a valid labour price list which will be used for pricing [jobs](#) for equipment on this [contract](#).

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

This list is the third in line on the labour price retrieval hierarchy after the [contract](#) line conditions and [contract](#) equipment.

The lists can be set up using the Maintain Labour Price List [task](#) if the [company](#) is pricing by rate or the Maintain [Cost/Price List task](#) if the [company](#) is pricing by grade.

This field is optional, as the [company](#) may have labour price lists set at a lower level.

Contract Inv Bill To

If you wish [contract](#) invoices to go to a different customer, enter the customer in this field and the relevant address sequence in the next field.

Contract Invoice Bill Address Sequence (Untitled)

If you wish [contract](#) invoices to go to a different customer or address, enter the customer in the previous field and the relevant address in this field.

Parts Price List

Enter a valid parts price list which will be used for pricing [jobs](#) for equipment on the [contract](#).

Alternatively, use the prompt facility to select from the Pricing Type Select pop-up.

The price list prompt/validation will be against either the standard or advanced price lists/types depending on the [Sales Order Processing company](#) profile pricing setting.

This field is optional, as the [company](#) may have parts price lists set at a lower level.

Job Invoice Bill To

If you want [job](#) invoices to go to a different customer, enter the customer in this field and the relevant address in the next field.

Job Invoice Bill Address Sequence (Untitled)

If you want [job](#) invoices to go to a different customer or address, enter the customer in the previous field and the relevant address in this field.

Note: *Some of the fields on this window are only displayed if the function to which they relate has been selected for that [contract type](#).*

Parts Discount List

Enter a valid parts discount list which will be used for discounting parts prices for [jobs](#) for equipment on the [contract](#); this should either have a blank currency or one that matches the customer currency

Alternatively, use the prompt facility to select from the Pricing Type Select pop-up.

The discount list prompt/validation will be against either standard or advanced discount lists/types depending on the [Sales Order Processing company](#) profile pricing setting.

This field is optional, as the [company](#) may have parts price lists set at a lower level.

Functions

Re-value (F5)

Use this to total the nominal value of the fixed service charges for all the [contract](#) lines and display the new value in the Tot. [Contract](#) Value field on this window.

Update (F8)

Use this to update the [contract](#) details. This is only displayed when you have completed the Billing Parameters pop-up and, if you are pricing at header level, the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up.

Service (F14)

Use this to display the Service Parameters pop-up, where you can set up various response time and [visit](#) defaults.

Billing Maint. (F16)

Use this to display the Billing Parameters pop-up.

Conditions Maint (F18)

Use this to display the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up.

Text (F21)

Use this to update or add text for the [contract](#).

Quotation Only/Accept Contract (F22)

Use this as a toggle to change a [contract](#) to a [quotation](#), or to change a [quotation](#) into a [contract](#).

If you are currently maintaining a [contract](#), use this to change the [contract](#) to a [quotation](#). You can only change a [contract](#) to a [quotation](#) if the [contract's](#) status is Pending Start Date. When you select this, the [contract's](#) status will change to [Quotation](#) Only, and the function's description will change from [Quotation](#) Only to Accept [Contract](#).

If you are currently maintaining a [quotation](#), use this to change it to a [contract](#). The [quotation's](#) status will change to Pending Start Date, and the function's description will change from Accept [Contract](#) to [Quotation](#) Only.

Invoice Enquiry (F23)

Use this to display the Invoice Enquiry window.

Press Enter to validate your entries and then select **Update (F8)** to save the changes. Alternatively, select the required function to display the next window.

Service Parameters Pop-up

To display this pop-up select **Service (F14)** on the [Contract](#) Header Maintenance window.

Use this pop-up to set up the service maintenance agreement for the [contract](#).

Fields**Response Hours**

The value defaults from the [contract type](#), but may be overwritten. Enter up to five numeric characters (hhh:mm) to set the response time for the [contract](#). The response will apply to all [contract](#) lines, unless a line is given its own special response time.

Scheduled Visit Profile

Leave this field blank if you do not want to use a [scheduled visit profile](#). If you do, enter a valid [scheduled visit profile](#) (SVP) code of up to three alphanumeric characters.

The profile generates the [visits](#) to each piece of equipment on a [contract](#). The software selects the profile according to the following hierarchy:

- 1 Use the scheduled visit profile on the contract header.
- 2 If there is none, use the scheduled visit profile for the model.
- 3 If there is none, use the scheduled visit profile for the model group.
- 4 If there is none, use the scheduled visit profile from the company profile.
- 5 If there is none, do not generate visits.

As long as a [scheduled visit profile](#) is found, the software generates [visits](#) for the equipment line on the [contract](#), using the first [scheduled visit profile](#) found, when you select Generate [Visits](#) on the [Contract](#) Equipment Maintenance Detail window.

When a [scheduled visit profile](#) is entered in the Service Parameters pop-up, the **Schedule Override (F14)** function is displayed, enabling you to edit the [scheduled visit profile](#) details.

Use Scheduled Visit Override at Renewal

This field will only be displayed if a schedule override is entered.

Enter one of the following:

Unchecked - If, at [contract](#) renewal, the [scheduled visit profile](#) field will be blank

You can enter a valid [scheduled visit profile](#), but if you leave it blank, the [scheduled visit profile](#) hierarchy will determine the equipment [visits](#) to be generated on the renewed [contract](#).

Checked - If the software will use the *OV amendments to the [scheduled visit profile](#) when renewing the [contract](#) and generating equipment [visits](#)

Allow Service Cover When Contract Pending

This defaults from the [Company](#) Profile Maintenance Response window, but you can change it.

Use this checkbox as follows:

Unchecked - If [contract](#) cover will only be effective on and after the [contract](#) start date

Checked - If all [calls](#) that are logged before the [contract](#) start date (while the [contract](#) has a status of Pending Start Date) will be treated as though the [contract](#) cover was effective

This is reflected on the [Job](#) Details window.

Use Start Date Rates

This defaults from the [contract type](#) but you can change it.

Use this checkbox as follows:

Unchecked - If the price lists used for chargeable work will be those effective on the date on which the work is carried out

Checked - If the price lists and labour rates used for chargeable work will be those effective on the [contract](#) start date

Or, Until

If the Use Start Date Rates field is **checked**, this field must be **0/00/00**.

If the Use Start Date Rates field is **unchecked**, enter or select a valid date (format DDMMYY). The labour and parts price lists used for chargeable work, effective at the [contract](#) start date, will only be used until the date entered. After this date, the price lists used will be those effective on the date on which the work was carried out.

Global Price Code

Enter an existing global price.

Alternatively, use the prompt facility to select from the Global Price Increase Code pop-up.

The code is used in the Global Price Update [task](#), to select [contracts](#) for inclusion in the price revision then being applied.

Functions**Schedule Override (F14)**

Use this to change the [scheduled visit profile](#) for the [contract](#). The [Scheduled Visit Profile Maintenance Detail](#) window is displayed.

If you update the [scheduled visit profile](#), select **Update (F8)**. Then regenerate equipment [visits](#) using the revised [scheduled visit profile](#), by selecting Generate [Visits](#) for each record on the [Contract Equipment Maintenance Detail](#) window. The [scheduled visit profile](#) for a [contract](#) where the [scheduled visit profile](#) has been edited will now be displayed as *OV, to indicate that a standard [scheduled visit profile](#) has been overridden.

Billing Parameters Pop-up

To display this pop-up, select **Billing Maint. (F16)** on the [Contract](#) Header Maintenance window.

Note: Only those billing parameters that you selected for this [contract type](#) are displayed.

Use this pop-up to specify the billing frequency and other billing details for the [contract](#).

Fields**Set All Next Pricing Cycle to Dates To**

The software automatically uses the end date of the [contract's](#) first [term](#) for the first pricing cycle.

Only enter or select a date (format DDMMYY) in this field if you want the first [term](#) of the [contract](#) is to be shorter than subsequent, standard [terms](#).

This might happen if you want a [contract's term](#) to coincide with the start of a financial year, for example. You would shorten the first [term](#) to end on 5th April, but subsequent [terms](#) would be a whole year.

You define the subsequent, standard [term](#) length in the [Term](#) (Mths) field below.

Set All Next Pricing Cycle from Start Days To

The pricing cycle start day is the day on which the software first produces invoices for a [contract](#).

This day defaults either to the day on which the [contract](#) starts, or to the first of the following month, depending on the value of the Default Invoice Start Date to First of the Month field on the [Company](#) Profile Maintenance Assignment window.

If you enter a start day here, this changes the invoice day to any day following the [contract](#) start day, for up to one month. If the day you enter is less than the [contract](#) start day, the software assumes it to be the following month.

Fixed Service Charge - Term (Mths)

Enter the number of months within the [contract's](#) duration for which the [contract](#) price is protected from change, and the number of periods covered by the fixed service charge.

You express this [term](#) in months. It defaults to 12, but you can enter any value from 1-120 (10 years).

This [term](#) is the normal [term](#) for the [contract](#). The first [term](#) can differ. If there is a date in the Set All Next Pricing Cycle to Dates To field, the first [term](#) is shorter than the standard [term](#) you enter here.

Fixed Service Charge - Freq (Mths)

Enter the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number of months in the [term](#), as long as it divides exactly into the [term](#).

For example:

1 - Monthly

3 - Quarterly

12 - Annual invoicing in a 12-month [term](#).

You must enter **0** here if you have set the Advance/[Visit](#)/Arrears field to [Visit](#).

Fixed Service Charge - Advance/Visit/Arrears

This field indicates advance, [visit](#) or arrears billing. It defaults to the value in the Invoice Schedule field on the [contract type](#).

Select one of the following:

Advance (0) - To invoice in advance

The release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the [term](#) starts.

[Visit](#) (1) - To invoice after each scheduled [visit](#)

Arrears (2) - To invoice in arrears

In this case, the release date is the end of the [invoice period](#). The invoice for each [invoice term](#) is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

Fixed Service Charge - Next Pricing Cycle From

This field displays the date of the next pricing cycle. This is the date on which the next [contract invoice term](#) to be processed will start. The software maintains this field.

Fixed Service Charge - Next Pricing Cycle To

This field displays the date on which the next [contract invoice term](#) to be processed will end. This defaults to the Next Pricing Cycle From date plus the [billing term](#). You can override this when you first enter the [contract](#).

The To date is the end of the [contract term](#) and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the [term](#).

[Contract](#) price increases during the [term](#) will not take effect until after the Next Pricing Cycle To date has been passed.

Rental Charge - Term (Mths)

Enter the number of months within the [contract](#) duration that the rental price is protected from change, and the number of periods covered by the rental charge.

You express this [term](#) in months. It defaults to 12, but you can enter any value from 1-120 (10 years).

This [term](#) is the normal [term](#) for the [contract](#). The first [term](#) can differ. If there is a date in the Set All Next Pricing Cycle to Dates To field, the first [term](#) is shorter than the standard [term](#) you enter here.

Rental Charge - Freq (Mths)

Enter the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number in the [term](#), as long as it divides exactly into the [term](#).

For example:

1 - Monthly

3 - Quarterly

12 - Annual invoicing in a 12-month [term](#)

Rental Charge - Advance/Visit/Arrears

This indicates advance, [visit](#) or arrears billing. It defaults to the value in the Invoice Schedule field on the [contract type](#).

Select one of the following:

Advance (0) - To invoice in advance

The release date is the start of the [invoice period](#). The invoice for each [invoice term](#) is issued before the [term](#) starts.

[Visit](#) (1) - To invoice after each scheduled [visit](#)

Arrears (2) - To invoice in arrears

The release date is the end of the [invoice period](#). The invoice for each [invoice term](#) is issued after the [term](#) finishes.

Rental Charge - Next Pricing Cycle From

This field displays the date of the next pricing cycle. This is the date on which the next [contract invoice term](#) to be processed will start. The software maintains this field.

Rental Charge - Next Pricing Cycle To

This field displays the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date plus the [billing term](#). You can override this when you first enter the [contract](#).

The To date is the end of the [contract term](#) and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the [term](#).

[Contract](#) price increases during the [term](#) will not take effect until after the Next Pricing Cycle To date has been passed.

Pre-billing Charge - Freq (Mths)

Enter the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number in the [term](#), as long as it divides exactly into the [term](#).

For example:

1 - Monthly

3 - Quarterly

12 - Annual invoicing in a 12-month [term](#)

Pre-billing Charge - Advance/Visit/Arrears

This indicates advance, [visit](#) or arrears billing. The initial value defaults to that set up on the [contract type](#).

Select one of the following:

Advance (0) - If the invoice release date is the start of the [invoice period](#)

[Visit](#) (1) - If the invoice release date is the date of the scheduled [visit](#)

Arrears (2) - If the invoice release date is the end of the [invoice period](#)

Pre-Billing Charge - Next Pricing Cycle From

This field displays the date of the next pricing cycle. This is the date on which the next [contract invoice term](#) to be processed will start. The software maintains this field.

Pre-Billing Charge - Next Pricing Cycle To

This is the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date, plus the [billing term](#). You can change this when you first enter the [contract](#).

The To date is the end of the [contract term](#) and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the [term](#).

[Contract](#) price increases during the [term](#) will not take effect until after the Next Pricing Cycle To date has been passed.

Interim Charge - Freq (Mths)

You use interim pricing if you want to charge according to a meter estimate or actual reading returned by the user.

Enter the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number in the [term](#), as long as it divides exactly into the [term](#).

For example:

1 - Monthly

3 - Quarterly

12 - Annual invoicing in a 12-month [term](#)

Interim Charge - Next Pricing Cycle From

This field displays the date of the next pricing cycle. This is the date on which the next [contract invoice term](#) to be processed will start. The software maintains this field.

Interim Charge - Next Pricing Cycle To

This field displays the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date, plus the [billing term](#). You can change this when you first enter the [contract](#).

The To date is the end of the [contract term](#) and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the [term](#).

[Contract](#) price increases during the [term](#) will not take effect until after the Next Pricing Cycle To date has been passed.

Reconciliation Charge - Term (Mths)

You express this [term](#) in months. It defaults to 12, but you can enter any value from 1-120 (10 years).

Use reconciliation pricing if you want to charge according to an actual meter reading. You can apply additional meterage charges, or give credits for overcharges. The reconciliation [term](#) must be a multiple of the interim period.

The reconciliation [term](#) is the number of months after which the software will compare the number of machine cycles (for example, copies or vends) with the number of cycles which have already been billed. This billing could be invoicing in advance or invoicing at an interim stage as a result of an estimated or customer advised meter reading.

This [term](#) is the normal [term](#) for the [contract](#). The first [term](#) can differ. If there is a date in the Set All Next Pricing Cycle to Dates To field, the first [term](#) is shorter than the standard [term](#) you enter here.

Reconciliation Charge - Next Pricing Cycle From

This field displays the date of the next pricing cycle. This is the date on which the next [contract invoice term](#) to be processed will start. The software maintains this field.

Reconciliation Charge - Next Pricing Cycle To

This is the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date plus the [billing term](#). You can change this when you first enter the [contract](#).

The To date is the end of the [contract term](#) and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the [term](#).

[Contract](#) price increases during the [term](#) will not take effect until after the Next Pricing Cycle To date has been passed.

Press Enter or **Update (F8)** to validate your entries.

If any of the Next Pricing Cycle To dates does not equal the start date of the next [term](#) plus the [normal invoice term](#), you will receive a warning message, which you can choose to ignore.

Select **Update (F8)** to update the data.

Contract Header Maintenance Contract Conditions Pop-up

To display this pop-up, select **Conditions Maint (F18)** on the [Contract](#) Header Maintenance window.

If this is a header-priced [contract](#) (the Header Level Pricing field on the [Contract](#) Header Maintenance window is **checked**), only the [Cover Type](#), Eff Date, Currency (untitled) and Fixed Service Charge fields are displayed.

If this is not a header-priced [contract](#) (the Header Level Pricing field on the [Contract](#) Header Maintenance window is **unchecked**), use this pop-up to set up the defaults for the [Contract Conditions](#) pop-up for each individual piece of equipment you add to this [contract](#).

Fields

Cover Type

Enter a header level [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Eff Date

This effectivity date defaults to the [contract](#) start date, but you can change this to a later date (format DDMMYY).

Fixed Service Charge

Enter the value to be charged. The software will apply this charge either for the [term](#) of the [contract](#), or for a month, depending on the setting of the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window. Once you have decided on either month or [term](#) processing, you cannot change it.

Any charges you enter at header level will apply to all the equipment on the [contract](#), unless you set up conditions at equipment level. If you ever amend the header details, you should also check the conditions for each machine and amend them if necessary.

Minimum Volume

Enter the agreed minimum number of copies or vends which you will invoice each month.

You can only use this field if the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window is set to **Month**.

The software will apply the minimum you entered at header level to all machine lines, unless you change the [contract conditions](#) for a particular line.

Copies in Rental

Enter the number of copies per month that you want to include in the rental charge.

Fixed Rental Charge

Enter the value to be charged. The software will apply this charge either for the [term](#) of the [contract](#), or for a month, depending on the setting of the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window. Once you have decided on either month or [term](#) processing, you cannot change it.

Any charges you enter at header level will apply to all the equipment on the [contract](#), unless you set up conditions at equipment level. If you ever amend the header details, you should also check the conditions for each machine and amend them if necessary.

Free Copies

Enter the number of free copies allowed on each monthly billing.

Pre-billing Value/Volume

The [contract type](#) determines whether this entry is for a monetary value or for a number of copies or vends.

Enter the value or quantity which has been agreed as the pre-determined monthly value or quantity for copies or vends.

You can only use this field if the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window is set to **Month**. Once you have decided on either month or [term](#) processing, you cannot change it.

Meter 1 - Band Volume To

Enter a numeric value for the maximum number of copies to which the price for the band applies.

The volume for band 1 must not be less than the minimum volume.

Meter 1 - Band Price per Copy

Enter the price per copy to be charged up to the band maximum.

This value is probably much smaller than the smallest unit of your currency. To save having to type several zeroes after the decimal point, you can enter a much larger number here and

convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the [Company](#) Profile Maintenance Meterage window.

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. You can type the notional value of 0.25 in this field and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

Meter 2 - Band Volume To

Enter the maximum number of copies to which the price for the band applies.

Meter 2 - Band Price per Copy

Enter the price per copy to be charged up to the band maximum.

This value is probably much smaller than the smallest unit of your currency. To save having to type several zeroes after the decimal point, you can enter a much larger number and convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the [Company](#) Profile Maintenance Meterage window.

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. You can type the notional value of 0.25 in this field, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

Functions

Add (F10)

The charges you enter for this [contract](#) are effective from the date shown in the Eff Date field. If you select **Add (F10)**, the date in this field changes to the current system date and the charges fields are all blanked out. You can now enter new charges, which will be effective from the new date.

You can change the effectivity date from the current date to the date you require, as long as the date is within the life of the [contract](#).

Note: Only the [contract conditions](#) that you have selected for this [contract type](#) will be displayed.

Use Page Up and Page Down to display more windows of differently dated [contract conditions](#).

Contract Billing History Window

To display this window, select **Invoice Enquiry (F23)** on the [Contract](#) Header Maintenance window.

This window displays the [contract](#) header details and lists the invoices created so far.

Fields

Invoice Number

This field displays the invoice number, with most recent invoices displayed first in the table.

Type

This field displays the type of invoice.

- 01 - Service invoice
- 02 - Rental
- 03 - [Visit](#)
- 04 - Interim (Meterage)
- 05 - Reconciliation (Meterage)

Currency Code

This field displays the currency of the invoice line.

Value

This field displays the value of the invoice line in the currency of the line.

Period From/To

These fields display the period that the invoice line is for.

Functions**Base Currency/Prime Currency (F14)**

Use this to toggle between displaying values in base currency and prime currency.

Select **Previous (F12)** to return to the [Contract](#) Header Maintenance window.

Contract Equipment Maintenance Detail Window

To display this window, select **Update (F8)** on the [Contract](#) Header Maintenance window, once that window is completed.

Alternatively, select an existing [contract](#) on the [Contract](#) Selection window and then press Enter.

Note: If you arrived at this window by selecting an existing [contract](#) on the selection window(s), when you select **Previous (F12)**, you do not return to the selection window, but to the [Contract](#) Header Maintenance window.

Use this window to specify the machines you want covered by this [contract](#). The top half of the window displays the machines already selected. You use the lower half to make your selection.

You list machines for selection by entering the relevant customer and [site](#) and then selecting Enter. All the machines for that [site](#) are then listed, and you can select as many as you want. Any machines in the list that are highlighted are already included in a pending or active [contract](#).

This window is divided into two. The upper half lists machines already selected to be on the [contract](#) and the lower half lists those machines available for selection. Both halves have selection capability.

Fields

Upper Half of the Window

Position to Serial Number

Enter a valid [serial number](#) of up to 15 alphanumeric characters.

If there are more machines on the [contract](#) than can be displayed on the window, entry of a known [serial number](#) for the [contract](#) will enable the cursor to be placed directly on that machine for selection.

Inst. Adr

This field displays the customer account code for the selected machine.

Loc

This field displays the [site](#) address sequence for the selected machine.

Model

This field displays the [model](#) of the selected machine.

Serial

This field displays the [serial number](#) for the selected machine.

Stat

This field displays the status of the selected machine line.

Inc. Dt.

This field displays the inclusion date and it defaults to the [contract](#) start date, but you can change it.

The machine line will continue to have a status of Pending until the inclusion date is reached and you update the [contract](#), by running either the Update [Contract task](#) or the Day End Routines [task](#).

Remov Dt

Enter or select the date on which the machine is to be removed from the [contract](#). The software will delete outstanding [visits](#).

The expiry of the machine from the [contract](#) will occur when you update the [contract](#), by running either the Update [Contract task](#) or the Day End Routines [task](#). This will cancel all outstanding [visits](#).

R. Hrs

Enter hours and minutes (format hhh:mm) to define the response time for this machine on the [contract](#).

The machine's response time overrides the [contract](#) header response time, and the software uses it at [call](#) logging to calculate the target time for the [call](#).

Vst

This field is system-maintained. One of the following will be displayed:

0 - If no [visits](#) have been generated for this machine

1 - If scheduled [visits](#) exist for this machine

Select by Account No

Enter a customer account and a corresponding address sequence in the Addr field and then press Enter to display all equipment at that [site](#).

Equipment already on a [contract](#) is displayed, with the [model](#) and [serial number](#) highlighted. If you add this equipment to another [contract](#), it will appear on an error report when you run the Update [Contract task](#), and its status on the new or active [contract](#) will remain as Pending. You must resolve such duplication issues, because a machine can only be active on one [contract](#) at any one time.

You can use the prompt facility on this field to select from the Customer Scan pop-up.

Addr

Enter a customer account in the Select by Account No field and a corresponding address sequence in this field and then press Enter to display all equipment at the [site](#).

Equipment already on a [contract](#) is displayed, with the [model](#) and [serial number](#) highlighted. If you add this equipment to another [contract](#), it will appear on an error report when you run the Update [Contract task](#), and its status on the new or active [contract](#) will remain as Pending. You must resolve such duplication issues, because a machine can only be active on one [contract](#) at any one time.

Model

Enter a valid [model](#) to display a list of all equipment for a [model](#) for a particular [site](#) within the customer account, customer and [site](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Lower Half of the Window

Selection (Untitled)

This field allows you to **check** any machines that have to be added to the upper half of the window and, as a result, onto the [contract](#).

Check this field against any machine in the lower half of the window to add it to the [contract](#). Machines which are already on a [contract](#) (indicated by highlighting) can be added to a new [contract](#), but can only be active on one [contract](#) at a time. They will be pending on any other [contracts](#).

When you add a machine, the Service [Visit](#) Profile Selection pop-up will automatically be displayed, on which you select the [scheduled visit profile](#) for the piece of equipment.

If you have not already completed it, the [Contract Conditions](#) pop-up is then displayed for acceptance or amendment and update. If header level pricing applies to the [contract](#), the header price is attached to the first machine added to the [contract](#); the machine is always displayed first on the list of equipment. For this reason, a dummy machine may be added for use with header pricing.

Options

Upper Half of the Window

Conditions

Use this to display the [Contract Conditions](#) pop-up so you can enter the charges you want to apply to the machine. If you are not using header level pricing, these charges will override the [contract](#) header conditions. If you are using header level pricing, the software will ignore anything you enter here.

Peripherals

Use this to display the [Contract](#) Equipment Peripherals window. This lists the peripherals attached to the machine, and allows you to enter additional charges for the peripheral.

Invoice History

Use this to display the invoice history on the [Contract](#) Line Billing History window.

Meter History

Use this to display all previous meter readings from all sources for the machine, on the Meter Reading History window.

Statistics

Use this to display the Meter Statistics window, which shows the average number of copies or vends, and the total usage, where meterage is used.

Visits

Use this to display the service [visits](#) scheduled for the machine on the Scheduled [Visits](#) Maintenance window. You can make amendments if you need to. You can also add [visits](#), but beware if the [contract](#) has already been priced or invoiced. If you have already run the Load Planned Maintenance [Jobs task](#) for the other [visits](#) on the [contract](#), run it again to convert these added [visits](#).

Generate Visits

Use this to generate [visits](#) for the machine if the Automatically Generate Service Schedule field is left **unchecked** on the [Contract Type](#) Maintenance window. The Service [Visit](#) Profile Selection pop-up is displayed, on which you select the service [visit](#) profile you want to use for this machine.

This option generates a schedule of planned [visits](#) by period for the machine. The software does this by applying the [scheduled visit profile](#) (SVP) hierarchy to generate [visits](#) using the first [scheduled visit profile](#) found:

- 1 Use the scheduled visit profile on the contract header.
- 2 If there is none, use the model's scheduled visit profile.
- 3 If there is none, use the model group's scheduled visit profile.
- 4 If there is none, use the company profile's scheduled visit profile.
- 5 If there is none, no visits will be generated.

Note: Make sure the Daily Calendar file is set up far enough ahead to handle the [visits](#) to be generated; otherwise, the Vst field will continue to display 0. If [visits](#) exist, the Vst field will be set to 1.

Delete

Use this to display the Delete Record pop-up, on which you enter a date and a cancellation reason code to remove the equipment line from the [contract](#).

Note: You set up cancellation reason codes under parameter type CCRC in the Codes/Parameters file.

Calendar Code

Use this to display the Calendar/Labour Code pop-up in which you enter the calendar you want to attach to this machine.

It also allows entry of the equipment level labour price list, parts price list and parts discount list.

Functions

Previous (F12)

If you select an existing [contract](#) on the [Contract](#) Maintenance Initial window, the [Contract](#) Equipment Maintenance Detail window is displayed immediately. However, if you select **Previous (F12)**, you do not return to the [Contract](#) Maintenance Initial window, but to the [Contract](#) Header Maintenance window.

Text (F21)

Use this to update existing text, or enter new text.

Once you have added the equipment and it is displayed in the upper half of the window, you can select the options listed above against any machine or select **Exit (F3)** to leave the [task](#).

Contract Conditions Pop-up

To display this pop-up, select Conditions against a piece of equipment on the [Contract](#) Equipment Maintenance Detail window. This equipment must already have been added to the [contract](#).

The software displays this pop-up automatically when you add a piece of equipment to a non-meterage [contract](#).

This pop-up will default to display any conditions you set up using the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up.

Caution:-Any subsequent changes you make to the contract conditions at contract header level will not be carried through to the existing equipment contract conditions. This means that if you make changes at the contract header level, you should also select Conditions to check the conditions for each machine, and amend them if necessary.

Fields

Cover Type

Enter the relevant [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Eff Date

This field defaults to the [contract](#) start date, but you can change this to a later date (format DDMMYY).

Fixed Service Charge

Enter the value to be charged for fixed service for this piece of equipment.

The software will apply this charge either for the [term](#) of the [contract](#) or for a month, depending on the setting of the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window. You cannot change this setting once you start processing.

If you set up a header charge in the Billing Parameters pop-up, it is displayed for change or acceptance.

If you enter **0**, the equipment will be priced at zero. This allows the equipment to be serviced free of charge for the period of this condition. For example, you may wish to put a piece of equipment still covered by the manufacturer's warranty onto a [contract](#) to establish a planned [visit](#) schedule for it. This equipment can then be supported free of charge for the first 12 months but you may charge for the maintenance [visit](#).

If you leave this field blank and press Enter, the appropriate charge for the [division](#), [model](#) group, [model](#) sub-group and [model](#) for the [contract type](#) and [term](#) is retrieved from the [contract](#) rate for the specified currency.

If header level pricing applies to the [contract](#), any fixed service charge you enter here is ignored. Entries would be for memo purposes only, and the sum of them would be displayed in the Tot [Contract](#) Value field on the [Contract](#) Header Maintenance window.

Minimum Volume

Enter the agreed minimum number of copies or vends which will be invoiced each month.

You can only use this field if you have set the Processing by Month or [Term](#) field to Month on the [Company](#) Profile Maintenance Response window. You cannot change this setting once you start processing.

Minima entered at machine level will override those defaulted from the [contract](#) header conditions.

Copies in Rental

Enter a numeric value for the number of copies per month which are to be included in the rental charge.

Fixed Rental Charge

Enter the value to be charged for rental.

This value will be applied for the [term](#) of the [contract](#), or for a month, depending on the setting of the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window. You cannot change this setting once you start processing.

If you set up a charge on the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up, it is displayed for change or acceptance.

If you enter a value of **0**, the [visit](#) will be priced at zero.

If you leave this field blank and then press Enter, the software will retrieve the appropriate charge for the [division](#), [model](#) group, [model](#) sub-group and [model](#) for the [contract type](#) and [term](#) from the [contract](#) rates file for the specified currency.

Free Copies

Enter the number of free copies or vends allowed on each monthly billing.

Pre-billing Value/Volume

The [contract type](#) determines whether this entry is for a monetary value or for a number of copies or vends.

Enter the value or quantity which has been agreed as the pre-determined monthly value or quantity for copies or vends.

You can only use this field if the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window is set to Month. Once you have decided on either month or [term](#) processing, you cannot change it.

Meter 1

Band Volume To

Enter the maximum number of copies to which the price for the band applies.

The volume for band 1 must not be less than the minimum volume.

Copy bands you enter for the machine line override the defaults from the [contract](#) header conditions.

Band Price per Copy

Enter the price per copy you want to charge up to the band maximum.

For pooled [contracts](#), you can only define copy charges on the [contract](#) header conditions. All machines must use the same copy price.

This value is probably much smaller than the smallest unit of your currency. To save having to type several zeroes after the decimal point, you can enter a much larger number there, and convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the [Company](#) Profile Maintenance Meterage window.

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. You can type the notional value of 0.25 per copy, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

Meter 2

Band Volume To

Enter the maximum number of copies to which the price for the band applies.

Copy bands you enter for the machine line override the defaults from the [contract](#) header conditions.

Band Price per Copy

Enter the price per copy to be charged up to the band maximum.

For pooled [contracts](#), you can only define copy charges on the [contract](#) header conditions. All machines must use the same copy price.

This value is probably much smaller than the smallest unit of your currency. To save having to type several zeroes after the decimal point, enter a much larger number, and you can convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the [Company](#) Profile Maintenance Meterage window.

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. You can type the notional value of 0.25 per copy, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

Warranty Units

Enter the machine warranty units that will be used for the meter 1.

This will be used in conjunction with the machine initial reading to suggest that a [job](#) should or should not be set to type Warranty at [call](#) logging.

In other words, if a breakdown [job](#) is created and the warranty units are not used up, the system will suggest that the [job](#) should be converted to a warranty [job](#).

If a warranty [job](#) is created and the warranty units are used up, the system will suggest that the [job](#) should be converted to a breakdown [job](#).

Labour Price List

Enter a valid labour price list, which will be used for pricing [jobs](#) for equipment on this [contract](#).

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

This list is the highest priority on the labour price retrieval hierarchy.

The lists can be set up using the Maintain Labour Price List [task](#) if the [company](#) is pricing by rate or the Maintain [Cost/Price List task](#) if the [company](#) is pricing by grade.

This field is optional, as the [company](#) may have labour price lists set at a lower level.

Parts Price List

Enter a valid parts price list, which will be used for pricing [jobs](#) for equipment on the [contract](#).

Alternatively, use the prompt facility to select from the Pricing Type Select pop-up.

The price list prompt/validation will be against either standard or advanced price lists/types depending on the [Sales Order Processing company](#) profile pricing setting.

This field is optional, as the [company](#) may have parts price lists set at a lower level.

Parts Discount List

Enter a valid parts discount list, which will be used for discounting parts prices for [jobs](#) for equipment on the [contract](#).

Alternatively, use the prompt facility to select from the Pricing Type Select pop-up.

The discount list prompt/validation will be either against standard or advanced discount lists/types depending on the [Sales Order Processing company](#) profile pricing setting.

This field is optional, as the [company](#) may have parts price lists set at a lower level.

Functions

Add (F10)

The conditions you enter for this [contract](#) are effective from the date shown in the Eff Date field. If you select **Add (F10)**, the date in this field changes to the current system date and the charges fields are all blanked out. You can now enter new charges, which will be effective from the new date.

You can change the effectivity date from the current date to the date you require, as long as the date is within the life of the [contract](#).

Use Page Up and Page Down to display further pop-ups of differently dated [contract conditions](#).

Note: Only those [contract conditions](#) that you selected for this [contract type](#) will be displayed.

Select **Update (F8)** to update the data. If this [contract type](#) was set up with the Automatically Generate Service Schedule field checked, you will be able to select a [scheduled visit profile](#) for the new piece of equipment before the update takes place.

Service Visit Profile Selection Pop-up

This pop-up is displayed when you add a new machine to a non-meterage [contract](#), and the [contract type](#) has the Automatically Generate Service Schedule field checked on the [Contract Type](#) Maintenance window. It is displayed after the [Contract Conditions](#) pop-up is completed.

This pop-up is also displayed if the [contract type](#) has the Automatically Generate Service Schedule field left unchecked on the [Contract Type](#) Maintenance window, and you select Generate [Visits](#) against the machine on the [Contract](#) Equipment Maintenance Detail window.

Use this pop-up to specify the [scheduled visit profile](#) you want for the machine on this [contract](#).

Fields

Service Visit Profile

Enter the [scheduled visit profile](#) you want to apply to the machine.

Alternatively, use the prompt facility to select from the [Scheduled Visit Profile](#) pop-up.

You can change the default, which the software finds by going through the hierarchy of [scheduled visit profiles](#).

Select **Update (F8)** to update and return to the [Contract](#) Equipment Maintenance Detail window.

Contract Equipment Peripherals Window

To display this window, select Peripherals against a piece of equipment on the [Contract](#) Equipment Maintenance Detail window.

This window lists all the peripherals attached to the piece of equipment you selected.

Fields

Date Removed

Enter or select the date on which you want to remove the peripheral from the [contract](#).

The equipment will be removed from the [contract](#) during [contract](#) updating, which is run as part of the Day End Routines [task](#) on the removal date.

Options

Select

Use this to select a particular peripheral and display the Peripheral Conditions pop-up.

Select a peripheral to display the Peripheral Conditions pop-up.

Peripheral Conditions Pop-up

To display this pop-up, select a peripheral on the [Contract](#) Equipment Peripherals window.

Fields

Effective Date

This effectivity date for the price list, for the additional peripheral charges, defaults to the [contract](#) start date. You can change this date (format DDMMYY).

Service Charge

Enter the additional service charge for the peripheral. This charge will be added to the charge for the main machine according to the pricing rules applied to that machine when you invoice the [contract](#).

Rental Charge

Enter the additional rental charge for the peripheral. This charge will be added to the charge for the main machine according to the pricing rules applied to that machine when you invoice the [contract](#).

Additional Min

The additional volume you enter here for the peripheral is added to the minimum for the main machine when calculating copy or vending charges.

This field is only displayed if the main machine is a meterage machine.

Addit Copy Cost

The additional price per copy that you enter here is added to the price per copy of the main machine, to calculate the total copy price to be invoiced.

This field is only displayed if the main machine is a meterage machine.

Note: Only those peripheral conditions selected for this [contract type](#) will be displayed. For example, the *Additional Min* field is only displayed if *Minimum Volume* field is checked in the Maintain [Contract Type](#) task.

Functions

Add (F10)

The peripheral conditions you enter for this [contract](#) are effective from the date shown in the Effective Date field. If you select **Add (F10)**, the date in this field changes to the current system date and the charges fields are all blanked out. You can now enter new charges, which will be effective from the new date.

You can change the effectivity date from the current date to the date you require, as long as the date is within the life of the [contract](#).

Select **Update (F8)** to update the data and return to the [Contract](#) Equipment Peripherals window.

Contract Line Billing History Window

To display this window, select Invoice History against a piece of equipment on the [Contract](#) Equipment Maintenance Detail window.

This window displays the invoice history of the [contract](#) and machine.

Fields

Invoice Number

This field displays the invoice number, with most recent invoices displayed first in the table.

Type

This field displays the type of invoice.

- 01 - Service invoice
- 02 - Rental
- 03 - [Visit](#)
- 04 - Interim (Meterage)
- 05 - Reconciliation (Meterage)

Curr Code

This field displays the currency of the invoice line.

Value

This field displays the value of the invoice line in the currency of the line.

Period From/Period To

These fields display the start and end period dates for the invoice line.

Functions

Prime/Base Currency (F14)

Use this to toggle between prime and base currency details.

Select **Previous (F12)** to return to the [Contract](#) Equipment Maintenance Detail window.

Meter Reading History Meter List Window

To display this window, select Meter Reading History against a piece of equipment on the [Contract](#) Equipment Maintenance Detail window.

This window displays a list of meters for the equipment line you selected.

Fields

No

This field displays the number of the meter.

Description

This field displays the description of the meter. This description can be changed at [installation](#) time to reflect the kind of meter more accurately.

Optional

This field indicates whether the meter is a mandatory meter or not. Mandatory meters will be force an entry when meter reading is requested, e.g. during [call](#) reporting or [job](#) completion.

Last Reading Date

This field displays the last date on which a reading was recorded for this meter on this piece of equipment.

Last Reading

This field displays the reading taken on the date above.

Options

Select

Use this to display a pop-up in which any readings for the selected meter number are listed.

Note: Meter numbers 1 and 2 can be billable. Meters 3 and above are counting meters only.

Select **Previous (F12)** to return to the [Contract](#) Equipment Maintenance Detail window.

Meter Reading History Window

To display this window, select a specific meter on the Meter Reading History Meter List window.

This window displays the history of meter readings for the specific meter of the machine.

The readings are shown in reverse date order.

Fields

Reading Date

This field displays the date on which a reading was recorded for this meter on this piece of equipment. The most recent reading will be displayed first.

Reading Type

This field displays the kind of reading that was taken on this date.

One of the following is displayed:

- 1 - Initial reading
- 2 - Service reading
- 3 - Estimated reading
- 4 - Customer reading
- 9 - Final reading

Reading

This field displays the actual reading taken on this date

Usage

This field displays the actual usage on this date. In its simplest form, this is the reading minus the initial reading to give the actual usage on this date. However, meter rollovers and meter change can alter the usage calculation.

Select **Previous (F12)** to return to the Meter Reading History Meter List window.

Meter Statistics Window

To display this window, select Statistics against a piece of equipment on the [Contract](#) Equipment Maintenance Detail window.

Select **Previous (F12)** to return to the [Contract](#) Equipment Maintenance Detail window.

Scheduled Visits Maintenance Window

To display this window, select [Visits](#) against a piece of equipment on the [Contract](#) Equipment Maintenance Detail window.

If Generate [Visits](#) has already been selected, the window will display the [visits](#) set up for the particular equipment record.

Use this window to amend or delete existing [visits](#), or to add further [visits](#).

Note: You must take care if you add new [visits](#) after pricing or invoicing the [contract](#). You will have to charge for the new [visit\(s\)](#) separately on a [job](#) invoice. If you have already run the Load Planned Maintenance [Jobs task](#), the new [visit\(s\)](#) will only be converted to [jobs](#) when you run it again.

Fields

To add a [visit](#), complete the next six fields.

Service Period

Enter the [service period](#) in which the [visit](#) is scheduled. It must be a valid period entered in YYPP format and must fall between the [contract](#) start and end dates.

Job Category

Enter the category of [job](#) to be done on this scheduled [visit](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Estimated Hours

Enter the number of hours you think it will take to carry out the scheduled [job](#). Enter up to five numeric characters, in the format hhh:mm.

Service Units

This field defaults from the schedule [visit](#) profile that has been used to create the [visits](#) (if applicable).

The Service Units field is not mandatory, but if it is entered against one [visit](#) in the list, it should be entered against them all.

The Service Units field cannot be negative and its value must be greater than the service units of the planned [visit](#) before it in the schedule.

Note: The [visits](#) are displayed in time sequence.

If service units are entered, the [contract](#) will be classed as a unit or time [contract](#). This means that when the Load Planned Maintenance [Jobs task](#) is run, it examines the service units value on future planned [visits](#) and determines whether any of the [visits](#) have been reached prematurely and if any have then generates a planned [visit job](#) for the current [service period](#) instead of the future period.

To decide if the service unit values have been reached prematurely, the estimate system is run to calculate usage for all equipment with service units and check the estimated value against the service units value.

For example:

Equipment X had an initial reading of 400 when it started on the [contract](#).

Period of Visit	Job Cat	No of Units
0718	SV1	250
0722	SV2	500
0726	SV3	750
0730	SV4	1000

The current period is 0717.

Run planned maintenance [visit](#) load for periods 0718 to 0719.

Examine [visit](#) 0722.

Run estimate for date of last day period 0719.

If the estimated reading is 499 or less, there is no change.

If the estimated reading is 500 or above, change the period of [visit](#) to 0719, and change the 0726 [visit](#) to 0723 and the 0730 [visit](#) to 0727.

Price per Visit

This field holds the price of the planned [visit](#) and includes all transactions that could be entered onto the planned [visit](#) as it is processed.

The first transaction for the [job](#) is given this price and all subsequent transactions are priced at 0, although the transaction [costs](#) will still be processed.

Total Visits

Enter the total number of scheduled [visits](#) to be made to this piece of equipment during the [contract term](#). This must be greater than zero.

Use These Visits on Renewal

Use this checkbox as follows:

Unchecked - If, when the [contract](#) is renewed, you want [visits](#) to be generated according to the [contract](#) header [scheduled visit profile](#)

Checked - If, when you create a [contract](#), the [scheduled visit profile](#) is defaulted in and you can generate the [visits](#)

Once the [visits](#) have been generated, select [Visits](#) against the equipment line to modify or delete the [visits](#).

Check this field if you want these revised [visits](#) to be used when the [contract](#) is renewed.

There is another reason to use this setting: on a [contract](#) with several lines of equipment you can apply a different schedule to each line. You can do this in two ways, either by using [cover types](#), or by selecting each equipment line with **Generate Visits** and typing the [scheduled visit profile](#) you want to apply. **Check** this field if you use the second method and you want these [visits](#) used at [contract](#) renewal.

Start Next Profile Load From (YYPP)

Enter the period from which you want the next profile load to start. This must either be a valid [service period](#) in YYPP format, or 9999.

You cannot set this field to a period less than the current period.

You can enter this manually, or you can leave it to be updated by the software, which refers to the last scheduled [visit](#) generated.

Procedure (Proc)

This field can be used to differentiate further which of the planned [visit job](#) templates will be picked up when the Load Planned Maintenance [Jobs task](#) is run.

Enter a valid procedure.

Alternatively, use the prompt facility to select from the PROC Procedure Code pop-up.

Options

Amend

Use this to re-display the selected line in the fields in the lower half of the window, where you can make changes.

Delete

Use this to delete the scheduled [visit](#). The software marks the line as deleted; and will remove it after you update. If you want to remove the machine from the [contract](#), you just have to enter the Equipment Maintenance window Remov Dt field. When you run the Day End Routines [task](#) on this date, the software deletes the records, including the [visit](#) records.

Note: Once you have run the Load Planned Maintenance [Jobs task](#), and have created the [jobs](#), you cannot delete [visit](#) lines.

Functions

Text (F21)

Use this to enter or update text.

Select **Update (F8)** to save your changes.

Delete Record Pop-up

To display this pop-up, select Delete on the [Contract](#) Equipment Maintenance Detail window once equipment has been added to a [contract](#).

If you want to delete a piece of equipment from a [contract](#), you must first enter the date and a cancellation reason code.

Fields

Removal Date

You must enter the date (format DDMMYY) on which you want the removal to take place.

Cancel Reas Code

You must enter a valid reason code for the removal.

Alternatively, use the prompt facility to select from the CCRC Cancel Reason Code pop-up.

Inclusion Date

This field displays the date on which this piece of equipment was included on the [contract](#).

Response Hours

This field displays the number of response hours for this piece of equipment. If no response time is on the equipment line, the software will use the response time from the [contract](#) header.

Select **Delete (F11)** to perform the deletion. The machine is removed from the [contract](#).

Maintain Contract Type [2/EQC]

Use this [task](#) to maintain the details of your [contract types](#).

A [contract type](#) defines a type of [contract](#). Each [contract type](#) holds the duration of the [contract](#), any guaranteed response hours, the invoice schedule (in advance, in arrears, or on completion of each scheduled maintenance [visit](#)) and whether a [quotation](#) or [contract](#) is generated at renewal time.

It also specifies whether service charges, rental charges or various meterage conditions will apply.

[Contract types](#) define the different types of [service contract](#) you offer your customers, so you might set up gold and silver [contract types](#) for these different types of [contract](#).

The [contract type](#):

- Provides default data ([contract](#) duration, invoice schedule, invoice at start date flag) for the [contract](#)

These can be changed once you start to maintain the [contract](#) itself.

- Provides [call](#) escalation monitoring, using the guaranteed response time to calculate the target arrival time for the engineer

All the [contracts](#) you set up must have a user-defined [contract type](#). The software uses a default [contract type](#) of *NO for work on equipment not covered by a [service contract](#).

A [contract](#) is defined by its [contract](#) number, [contract type](#) and start date.

You must set up at least one [contract type](#) before you can create any [contracts](#). You cannot delete a [contract type](#) once you have used it with a [contract](#).

Contract Type Maintenance Initial Window

To display this window, select the Maintain [Contract Type task](#).

Use this window to select the [contract type](#) you want to maintain, or enter a code to set up a new [contract type](#).

Fields

Contract Type

Enter a new or existing [contract type](#).

Alternatively, use the prompt facility to select from the [Contract Type Selection](#) pop-up.

If the type exists, it will be displayed for update; otherwise a new [contract type](#) can be added.

One [contract type](#) with the code *NO must be set up, with a fixed service charge, for [visit-only contracts](#). These are not invoiced or priced by the [contract](#) routines, only in [job](#) pricing and invoicing.

Select a [contract type](#) or enter a [contract type](#) and then press Enter to display the [Contract Type Maintenance](#) window.

Contract Type Maintenance Window

To display this window, select a [contract type](#) enter or select a [contract type](#) and then press Enter on the [Contract Type Maintenance Initial](#) window.

Use this window to specify all the parameters that make up the [contract type](#).

Fields

Description (Untitled)

Enter a description of up to 20 alphanumeric characters to identify the type of [contract](#).

Automatically Generate Service Schedule

Use this checkbox as follows:

Unchecked - If you will not be able to select a [scheduled visit profile](#) when adding equipment to [contracts](#) which have this [contract type](#)

Checked - If, when you add a piece of equipment to a [contract](#) of this [contract type](#), a pop-up will enable you to select a [scheduled visit profile](#)

Quotation Required on Renewal

Use this checkbox as follows:

Unchecked - If this type of [contract](#) will renew as a pending [contract](#)

Checked - If this type of [contract](#) will renew as a [quotation](#)

Use Contract Start Date Rates

Use this checkbox as follows:

Unchecked - If labour rates and parts prices used in [job](#) pricing, for any [jobs](#) on equipment covered by this [contract](#), will be those effective on the date of the [call](#) out, or the date of the engineer's [visit](#)

Checked - If labour rates and parts prices used in [job](#) pricing, for any [jobs](#) on equipment covered by this [contract](#), will be those effective at the [contract](#) start date

Response Hours Guarantee

This field displays the normal response time guaranteed for equipment covered by this type of [contract](#).

The software uses this value when calculating [job](#) escalation.

Contract Duration (Months)

This field displays the standard [contract](#) duration, used to calculate [contract termination](#). Set this duration to zero (blank) to indicate a [contract](#) which runs indefinitely. The field works in calendar months, not periods.

Termination Notice in Days

Enter the default number of penalty days the software will use to calculate the credit owed when a customer cancels a [contract](#).

For example, if you wish to charge a customer for 10 days' cover when they ask to cancel a [contract](#), enter 10.

Invoice Schedule

Select one of the following:

Advance (0) - To invoice in advance

Arrears (2) - To invoice in arrears

In this case, the invoice cannot be printed until after the end of any instalment period.

Calendar Code

If you want to attach a calendar to this [contract type](#), enter it here.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

Contract Type to Include Following Parameters?

Fixed Service Charge

Use this checkbox as follows:

Unchecked - If you cannot apply fixed service charges to this [contract type](#)

Checked - If you can apply fixed service charges to this [contract type](#)

The input fields for these charges are displayed on the [Contract Conditions](#) pop-up.

Interim Charges

Use this checkbox as follows:

Unchecked - If you cannot apply interim charges to this [contract type](#)

Checked - If you can apply interim charges to this [contract type](#)

The input fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Interim charges allow for actual or estimated copies in excess of the minimum to be invoiced periodically.

Fixed Rental Charge

Use this checkbox as follows:

Unchecked - If you cannot apply fixed rental charges to this [contract type](#)

Checked - If you can apply fixed rental charges to this [contract type](#)

The input fields for these charges are displayed on the [Contract Conditions](#) pop-up.

Reconciliation Charges

Use this checkbox as follows:

Unchecked - If you cannot apply reconciliation charges to the [contract type](#)

Checked - If you can apply reconciliation charges to the [contract type](#)

The input fields for these charge cycles will be displayed on the [Contract Conditions](#) pop-up.

Reconciliation charges mean that at the end of the period you can invoice actual copies in excess of the minimum, or credit excess estimated copies which have been invoiced.

Units Incl. Rental

Use this checkbox as follows:

Unchecked - If no copies are to be included in the rental charge

Checked - If you can enter the number of copies per month to be included in the rental charge

The input field for this allowance will be displayed on the [Contract Conditions](#) pop-up.

Minimum Volume

Use this checkbox as follows:

Unchecked - If you cannot apply minimum copy volumes to this [contract type](#)

Checked - If you can apply minimum copy volumes to this [contract type](#)

The input fields for these copy volumes will be displayed on the [Contract Conditions](#) pop-up.

Unit Charges 1

Use this checkbox as follows:

Unchecked - If you cannot apply copy charge bands to this [contract type](#)

Checked - If you can apply copy charge bands to this [contract type](#)

The input fields for these copy charge bands are displayed on the [Contract Conditions](#) pop-up.

Pre Billing Value

Use this checkbox as follows:

Unchecked - If you cannot apply a pre-determined value to this [contract type](#)

Checked - If you can apply a pre-determined value to this [contract type](#)

The input fields for this value are displayed on the [Contract Conditions](#) pop-up.

Unit Charges 2

Use this checkbox as follows:

Unchecked - If you cannot apply copy charge bands to this [contract type](#)

Checked - If you can apply copy charge bands to this [contract type](#)

The input fields for these copy charge bands are displayed on the [Contract Conditions](#) pop-up.

Pre Billing Volume

Use this checkbox as follows:

Unchecked - If you cannot apply a pre-determined volume to this [contract type](#)

Checked - If you can apply a pre-determined volume to this [contract type](#)

The input fields for this volume are displayed on the [Contract Conditions](#) pop-up.

Free Copies

Use this checkbox as follows:

Unchecked - If no free copies are allowed

Checked - If the number of free copies specified in the [contract conditions](#) is allowed on each monthly billing

Warranty Units

Use this checkbox as follows:

Unchecked - If no warranty units are allowed

Checked - If warranty units can be entered during [contract](#) equipment maintenance

Free Visits

This field is for future development.

Select **Update (F8)** to save any changes.

Maintain Scheduled Visit Profile [3/EQC]

Use this [task](#) to maintain the schedule of planned maintenance [visits](#) for each [visit](#) profile.

A [scheduled visit profile](#) defines the number, type and frequency of scheduled maintenance [visits](#). Each [visit](#) has an associated [job category](#), to indicate the kind of work to be done, and the period in which it is scheduled to be carried out.

Once set up, a [visit](#) profile can be linked to the [company](#), to a [cover type](#), [model](#), or to an individual [contract](#), to define the schedule of [visits](#) at that level.

Although not essential to the system, [visit](#) profiles are used to save time within the Maintain [Contracts task](#). When you need to define the service [visit](#) schedule for each piece of equipment on a [contract](#), you can specify a [visit](#) profile instead, and this generates the schedule automatically.

Note: You set up the [scheduled visit profile](#) description on the Codes/Parameters file under type VSTP.

Scheduled Visit Profile Maintenance Selection Window

To display this window, select the Maintain [Scheduled Visit Profile task](#).

Fields

Enter Profile to be Maintained

Enter a valid [scheduled visit profile](#).

Alternatively, use the prompt facility to select from the [Scheduled Visit Profile](#) Maintenance window.

A [scheduled visit profile](#) is a recommended pattern of planned maintenance [visits](#) which can be applied at [contract](#), [model](#), [model](#) group, or [company](#) level. The profile indicates both the [service periods](#) and [job](#) categories of the intended [visits](#).

When you add a piece of equipment to a [contract](#), you can then run the Load Planned Maintenance [Jobs task](#), and this automatically generates the [visits](#) for the equipment, based on the pattern of the [visit](#) profile.

Press Enter to display the [Scheduled Visit Profile](#) Maintenance Detail window.

Scheduled Visit Profile Maintenance Detail Window

To display this window, select a profile or enter a profile and then press Enter on the [Scheduled Visit Profile](#) Maintenance Selection window.

Fields

Description (Untitled)

Enter a description of up to 30 alphanumeric characters for the [scheduled visit profile](#).

Rel Prd.

Enter the number of [service periods](#) after the period in which a [contract](#) starts in which a scheduled service [visit](#) will be generated.

0 is valid, if you want the first [visit](#) to be made in the [contract's](#) start period.

The relative period used in this context is the [service period](#) relative to the period in which the [contract's](#) start date falls.

For example, let us suppose you are using a profile for three [visits](#) per annum, you have set up Service Management to use monthly [service periods](#) and you define the relative periods as 02, 06 and 10. For a [contract](#) which starts in period 07/07 (July 2007), the software would generate a schedule of three [visits](#), in periods 09/07, 01/08 and 05/08.

Job Category

Enter an existing [job category](#). This indicates the type of [job](#) that the engineer will perform during the planned maintenance [visit](#).

If the [contract](#) covers several years, and you wish to generate the same pattern of [visits](#) year after year, you do not have to enter these repeated [visits](#).

Instead, enter all the [visits](#) for one year and enter the special [job category](#) of *RP at the end (you do not have to enter any estimated hours for this, but it must have a relative period). This tells the software to generate [visits](#) as far ahead as the [contract](#) end date, or as far ahead as the number of [service periods](#) to be loaded (as specified on the [company](#) profile), whichever is the sooner. Therefore, even if you only enter one year's [visits](#) here, they will be generated for subsequent years automatically. This repeat cycle of [visits](#) will be generated using the existing [visit](#) profile, starting from the relative period entered against the *RP code.

The Load Planned Maintenance [Jobs task](#) will, in fact, load any [job category](#) found here, not just a [job category](#) code set up as PM.

Est Hours

Enter up to five numeric characters (hhh:mm) for the estimated [job](#) duration.

This memo field is for future development.

Service Units

If the profile is for time and units, the Service Units field should be set up.

It should not be possible to have units against some [visits](#) and not others. If units exist against one of the [visits](#), they should exist against them all and each one should be greater than the units of the [visit](#) before it in the schedule.

Note: The [visits](#) are displayed in time sequence.

If service units are entered, the [contract](#) will be classed as a unit or time [contract](#). This means that when the Load Planned Maintenance [Jobs task](#) is run it examines future planned [visits](#) and determines if any of the [visits](#) have been reached prematurely. If any have, it generates a planned [visit job](#) for the current [service period](#).

To decide if the [visits](#) have been reached prematurely, the estimate system is run to calculate usage for all equipments with this kind of schedule and check the estimated value against the scheduled value.

Example:

Equipment X had an initial reading of 400 when it started on the [contract](#).

Period of Visit	Job Cat	No of Units
0718	SV1	250
0722	SV2	500
0726	SV3	750
0730	SV4	1000

Current period is 0717.

Run planned maintenance [visit](#) load for periods 0718 to 0719.

Examine [visit](#) 0722.

Run estimate for date of last day period 0719.

If the estimated reading is 499 or less, there is no change.

If the estimated reading is 500 or above, change the period of [visit](#) to 0719 and change the 0726 [visit](#) to 0723 and the 0730 [visit](#) to 0727.

Procedure (Proc.)

Use this field to differentiate further which of the planned [visit job](#) templates will be picked up when the Load Planned Maintenance [Jobs task](#) is run.

Enter a valid procedure.

Alternatively, use the prompt facility to select from the Procedure pop-up.

Functions

Resequence (F7)

Use this to re-sequence the relative periods numerically.

Select **Update (F8)** to save the data.

Maintain Recommended Service Visits [4/EQC]

Use this [task](#) to maintain the [scheduled visit profile](#) which applies to each [model](#) group, by effectivity date.

This [task](#) defines the number, type and frequency of scheduled maintenance [visits](#) normally associated with a [model](#) group, by linking the [model](#) group with a [scheduled visit profile](#). Additionally,

there is an effective date which enables the same [model](#) group to be linked to different profiles for different time windows. The concept of [scheduled visit profiles](#) is explained in the Maintain [Scheduled Visit Profile](#) section.

The software uses the group's [scheduled visit profile](#) where there is no [scheduled visit profile](#) defined for the [contract](#) or the [model](#). If the [model](#) group has no profile, the software uses the one defined in the [company](#) profile. If this is absent, the software does not generate [visits](#).

Recommended Visits Maintenance Initial Window

To display this window, select the Maintain Recommended Service [Visits task](#).

Fields

Division

Enter a valid [division](#). You set up [divisions](#) in the Maintain [Division Code task](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group Code

Enter a valid [model](#) group. You set up [model](#) groups in the Maintain [Model](#) Group [task](#).

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Enter or select a valid [division](#) and [model](#) group and then press Enter to display the Recommended [Visits](#) Maintenance Detail window.

Recommended Visits Maintenance Detail Window

To display this window, enter or select a valid [division](#) and [model](#) group and then press Enter on the Recommended [Visits](#) Maintenance Initial window.

Use this window to maintain the [scheduled visit profiles](#) for the selected [division](#) and [model](#) group. If any already exist, they will be displayed in the table.

Fields

Effective Date

Enter or select the date (format DDMMYY) on which the [scheduled visit profile](#) is to come into effect. You can use the effectivity dates to link one [model](#) group to different profiles for different time windows.

Visit Profile Code

Enter a valid [scheduled visit profile](#).

Alternatively, use the prompt facility to select from the [Scheduled Visit Profile](#) pop-up.

The software uses the effective [scheduled visit profile](#) to generate scheduled service [visits](#) for each piece of this [model](#) group's equipment on the [contract](#). The software uses the following hierarchy to find the correct profile:

- 1 Use the scheduled visit profile on the contract header.
- 2 If there is none, use the model's scheduled visit profile.
- 3 If there is none, use the model group's scheduled visit profile.
- 4 If there is none, use the company profile's scheduled visit profile.
- 5 If there is none, no visits will be generated.

Options

Delete

Use this to delete the [scheduled visit profile](#).

Enter an effective date and a [visit](#) profile code and then press Enter to add a [scheduled visit profile](#).

Maintain Contract Rates [5/EQC]

Use this [task](#) to maintain the [term contract](#) rates for each combination of [model](#) group, sub-group, [model](#) and [contract type](#), by effectivity date and currency.

You can only use [contract](#) rates if you are using [term](#) processing. You cannot use them for monthly processing. You set this up in the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window.

The software uses [contract](#) rates to calculate the price for each piece of equipment on a [contract](#). For each [contract type](#) and [contract term](#), you can define the rates for each [model](#) group or sub-group or [model](#).

[Contract](#) rates specify the charge per scheduled maintenance [visit](#) and/or a fixed charge for each piece of equipment covered by the [contract type](#). [Contract](#) rates are held by effectivity dates; this means you can use different rates during different time windows. [Contract](#) rates are held for different currencies.

[Contract](#) rates are of two types:

- A rental charge, which is the price to be charged for the equipment rental for the [term](#)
- A service charge, which is the price to be charged for the piece of equipment's fixed service for the [term](#)

You can set either of these rates to zero and you can use one or more of these rates for the [contract](#) charge for a piece of equipment.

Once you have set up the rates, when you are maintaining a [contract](#) and setting up the conditions for the [contract](#) equipment, the software finds the [contract](#) rates data. If there is no [contract](#) rates data, you will have to enter a [special price](#), or zero, in the [Contract Conditions](#) pop-up.

Note: If you are using monthly rather than [term](#) pricing, you must set the rate per month within the [contract](#).

Contract Rates Maintenance Initial Window

To display this window, select the Maintain [Contract Rates](#) [task](#).

Fields

Division

Enter an existing [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

You set up [divisions](#) using the Maintain [Division Code](#) [task](#).

Model Group

Enter an existing [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

You set up [model](#) groups using the Maintain [Model](#) Group [task](#).

Each [model](#) group can have [contract](#) rates attached, with effective dates.

The software will use the current rate when pricing [contracts](#), to price a piece of equipment belonging to a particular [model](#) group.

Term

Enter the [billing term](#). Valid mandatory entries are from 1-120 calendar months; the default value is 12.

The [term](#) defines the price protection period for the [contract](#), and the number of periods for which [contract](#) pricing will generate pending invoice and actual invoice records.

The [contract](#) rate selected for the [contract](#) header will be for the same [term](#) as that entered in the [contract](#) billing parameters.

Currency Code

Enter a valid currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Based On

If you want to create a [contract](#) rate based on an existing one, enter the existing rate details here.

The software will set up the structure of the new rate based on the existing one, but you cannot amend the actual detail lines. If you need to change them, you have to delete them and enter new ones.

This means that the based on facility is of limited use.

Enter a valid [division](#) and [model](#) group and then press Enter to display the [Contract](#) Rates Maintenance window.

Contract Rates Maintenance Window

To display this window, enter or select a valid [division](#) and [model](#) group and then press Enter on the [Contract](#) Rates Maintenance Initial window.

Fields

Model Sub-group

You can optionally enter a valid [model](#) sub-group or leave this field blank.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

If you enter a value, the [contract](#) rates will apply to all [models](#) belonging to this [model](#) sub-group, within the [model](#) group and [division](#).

Model

You can optionally enter a valid [model](#) or leave this field blank.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

A [model](#) code is linked to [model](#) sub-group, [model](#) group and [division](#). If you set up a [contract](#) rate at [model](#) level at [contract](#) pricing, this rate will override any rates you set up at [model](#) sub-group or [model](#) group levels.

Effective Date

Enter the date (format DDMMYY) on which the [contract](#) rate becomes active. You cannot update the charges you enter if this field does not hold a valid date.

All existing [contract](#) rates for the new combination of [model](#) group, [model](#) sub-group and [model](#) that have earlier effective dates will be superseded.

Cover Type

Enter a valid [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

The software will apply the specified service, rental or [visit](#) charge(s) to this [cover type](#) for the product combination selected at [contract](#) pricing.

Currency Code

The currency you selected on the previous window is displayed.

Charges

Rental

Enter the rental to be charged for the [contract term](#), if [term](#) processing has been set on via the [Company](#) Profile Maintenance Response window.

If you have set up any charges on the [Contract Conditions](#) pop-up, they will override this rental charge.

The software calculates the price for a [contract](#) line by multiplying the charge per [visit](#) by the number of [visits](#) in the [term](#) and adding the rental and service charges for the [term](#).

Service

Enter the charge to be made for fixed service for the [contract term](#), if [term](#) processing has been set on via the [Company](#) Profile Maintenance Response window.

If you have set up any charges in the [Contract Conditions](#) pop-up, they will override this service charge.

The software calculates the price for a [contract](#) line by multiplying the charge per [visit](#) by the number of [visits](#) in the [term](#) and adding the rental and service charges for the [term](#).

Options

Delete

Use this to delete the [contract](#) rates for this combination of [model](#) group, [model](#) sub-group and [model](#) combination.

Enter the required data and then press Enter to update.

Maintain Cover Type [6/EQC]

Use this [task](#) to set up and maintain [cover types](#).

A [cover type](#) works with the [job category](#) to specify whether a [job](#) is chargeable or not. Each [job](#) has both a [cover type](#) and a [job category](#), and the software searches the [cover type/job category](#) charge matrix for the right combination of [cover type](#) and [job category](#), which specifies whether a [job](#) is chargeable.

Each piece of equipment covered by a [contract](#) must be assigned a [cover type](#). Different equipment on the same [contract](#) can have different [cover types](#). The [cover type](#) controls both [contract](#) and [job](#) pricing, in different ways.

- If you are working with a [job](#), when the system prices the [job](#), it looks at the [cover type/job category](#) charge matrix to determine which [job](#) elements (labour, materials etc.) to charge for. For non-[contract](#) equipment, a special [cover type](#) of *NO is assumed and is used to access the same matrix.
- If you are working with a [contract](#), the elements to charge for are already defined by the [contract type](#), at [contract](#) level. However, the [cover type](#) is used only when equipment is added to the [contract](#), to retrieve default prices from a set of standard [contract](#) rates.

If you are working with either [jobs](#) or [contracts](#), the system prevents you from creating a [job](#) for an invalid combination of [cover type](#) and [job category](#); that is, one for which there are no details in the matrix.

You can attach a [scheduled visit profile](#) to a [cover type](#).

Note: You must set up a minimum of one [cover type](#) on the software: *NO, meaning no [contract](#).

Cover Type Maintenance Selection Window

To display this window, select the Maintain [Cover Type](#) task.

Fields

Cover Type

Enter a new or existing [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Select a [cover type](#) or enter a [cover type](#) and then press Enter to display the [Cover Type](#) Maintenance window.

Cover Type Maintenance Window

To display this window, select a [cover type](#) or enter a [cover type](#) and then press Enter on the [Cover Type](#) Maintenance Selection window.

Fields

Description (Untitled)

Enter the description for a new [cover type](#).

Service Visit Profile

Enter a [scheduled visit profile](#) for the [cover type](#), if required.

Alternatively, use the prompt facility to select from the [Scheduled Visit Profile](#) pop-up.

Select **Update (F8)** to update the [cover type](#) and details.

Contract Quotation Print [20/EQC]

Use this [task](#) to print [quotations](#) for all [contracts](#) which have a status of [Quotation](#) Only.

When you select this [task](#), a batch [job](#) is submitted. The [job](#) will generate a printer file of [quotations](#) on the output queue.

The account address printed at the top of the report will be the [contract](#) invoice bill to account, if one exists.

After a [quotation](#) has been printed, it is flagged so that it will not be printed next time you select this [task](#).

Select Confirm **Submit (F8)** to submit the batch [job](#).

Renew Contract [21/EQC]

Use this [task](#) to renew all [contracts](#) which are due to expire, and which are flagged as being renewable. You should run this [task](#) on a regular basis (for example, monthly).

Note: *This procedure requires exclusive use of the [company](#).*

[Contracts](#) are renewed if:

- They have the Renew [Contract](#) field **checked** on the [Contract](#) Header Maintenance window.
- They are active. They must not be pending or expired.
- Their [contract termination](#) date is before or the same as the date selected on the [Contract](#) Renewal Selection window.

This process generates a new [contract](#) with a start date one day after the [termination](#) date of the original, and an end date equal to the start date plus the [contract](#) duration for the [contract type](#).

The [contract type](#) is the same as the base [contract](#).

The [contract](#) number assigned is dependent on the setting of the [company](#) profile field New [Contract](#) Number at Renewal. If this is left **unchecked**, the same number is retained. If it is **checked**, a new number is generated by the software, from the sequence in the [company](#) profile.

The status of the new [contract](#) is Pending Start Date, unless the [contract type](#) indicates that a [quotation](#) is required on renewal, in which case the status is set to [Quotation](#) Only. In the latter case, this will cause a [quotation](#) to be printed in the next run of the [Contract Quotation](#) Print [task](#), and the [quotation](#) can subsequently be changed to a true [contract](#) through the Maintain [Contracts](#) [task](#).

In order to renew a [contract](#), the equipment on the [contract](#) must still be eligible for the [contract type](#); that is, the [contract](#) charge rates must be in effect.

The renewal procedure generates a new service schedule for each piece of equipment on the [contract](#). This depends on the following:

- If the existing schedule has the Use These [Visits](#) on Renewal field **checked**, the new schedule is based on the existing one.
- If the existing [contract](#) header has a non-standard [visit](#) profile held against it, and the Use Scheduled [Visit](#) Override at Renewal field is **checked**, the new schedule is generated using the non-standard profile (and this non-standard profile will be attached to the new [contract](#)).
- If the existing [contract](#) header has a standard [visit](#) profile held against it, this is used to generate the new schedule.
- If the [model](#) number for the piece of equipment has a standard [visit](#) profile, this is used to generate the new schedule.
- If the [model](#) group for this piece of equipment has a standard [visit](#) profile, this is used to generate the new schedule.

- If the [company](#) profile has a standard [visit](#) profile, this is used to generate the new schedule. If not, this [task](#) will not be able to generate a new schedule.

What Should be Done after Renewal?

You can, if required, amend the new [contract](#), using the usual [contract](#) maintenance procedures, before you generate any [quotations](#) or invoices.

After [contracts](#) are renewed, check the equipment [Contract Conditions](#) pop-up (using the **Conditions** option on the [Contract](#) Equipment Maintenance Detail window in the Maintain [Contracts task](#)). It is these conditions which will be applied when the [contract](#) is priced, not the conditions at header level.

Contract Renewal Selection Window

To display this window, select the Renew [Contract task](#).

Use this window to enter or select the appropriate date.

Fields

Renew Those Which Will Expire on or before DDMMYY

Enter or select the expiry date limit of [contracts](#) for renewal.

The software reads through all active [contracts](#) and determines which ones to renew, by comparing the [contract](#) end date with the date you have entered here. If the [contract](#) end date is earlier than or equal to the entered date, it is renewed.

Select **Submit Job (F8)** to submit the [job](#) for processing.

Update Contract [22/EQC]

Use this [task](#) to perform various housekeeping procedures on the [contracts](#) for a [branch](#).

Note that the procedures included in this [task](#) are also included in the Day End Routines [task](#), when they apply to the whole [company](#).

Note: *This procedure requires exclusive use of the [company](#).*

When you run this [task](#), a batch [job](#) performs the following processing on [contracts](#) owned by the requesting service [branch](#):

- The software sets the status of any Active [contracts](#) that have reached their [termination](#) date to Expired. This also updates the [installation](#), so that it shows that the equipment is no longer covered.
- The software sets the status of any Pending Start Date [contracts](#) that have reached their start date to Active. The [installation](#) is also updated, so that it shows that the equipment is now covered.

- The software produces an error report of all pieces of equipment that are supposed to become active on a [contract](#) but are already covered by a different active [contract](#).
- The software selects for credit processing all [contracts](#) that have had a [termination](#) date entered before the end of their current [term](#). The [contracts](#) will appear on the report of [contracts](#) selected for credit.

Note: Because this processing is always performed as part of the Day End Routines [task](#), this [task](#) would normally only be run if there was an urgent requirement to update a [contract](#) status during the day.

Select **Submit Job (F8)** to submit the [job](#) for processing.

Request Quotes from Contract [23/EQC]

Use this [task](#) to create [contract quotations](#) from existing [service contracts](#).

Use this [task](#) if your customer already has a [contract](#), and wants a [quotation](#) for a different type of [contract](#) to cover the same equipment.

You can either generate the new [quotation](#) immediately, or you can store the request and generate the new [quotation](#) later, by running the Generate Deferred Request Quotes from [Contracts task](#).

You create [quotations](#) the same way as [contracts](#), but they have a special status of [Quotation Only](#). You can only create them for [contracts](#) with service and [visit](#) charges. The software will not generate [quotations](#) for rental and meterage [contracts](#).

You can print [contract quotations](#) on pre-printed stationery, to show account and [site](#) details, [contract](#) number, type, start date, duration, customer order number, equipment covered, number of scheduled maintenance [visits](#) and price. The software calculates the [quotation](#) price in the same way as the [contract](#) invoice price.

You convert a [quotation](#) to a [contract](#) by using the Maintain [Contracts task](#) to change the status from [Quotation Only](#) to Pending Start Date.

Request Quotes from Contract Detail Window

To display this window, select the Request Quotes from [Contract task](#).

Use this window to specify the [quotation](#) you want to create and the [contract](#) on which you want to base it.

Fields

New Contract

Enter a new [contract](#) number for the [quotation](#), using up to seven alphanumeric characters.

Contract Type (Untitled)

Enter a valid [contract type](#).

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

The new [quotation](#) must have the same [contract type](#) as the [contract](#) or [quotation](#) on which you are basing it.

Contract Date (Untitled)

Enter or select the date (format DDMMYY) on which the new [quotation](#) will start.

Based-on Contract

Enter the existing [contract](#) or [quotation](#) that is to form the source of the new [quotation](#).

Based-on Contract Type (Untitled)

Enter the [contract type](#) of the existing [contract](#) or [quotation](#).

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

This must be the same as the [contract type](#) of the new [quotation](#).

Based-on Contract Date (Untitled)

Enter or select the actual start date (format DDMMYY) of the based-on [contract](#) or [quotation](#) here.

Service Visits

Select one of the following:

Copy (1) - If only the existing, or outstanding, [visits](#) for each piece of equipment on the old [contract](#) or [quotation](#) will be copied to the new one

In this case, leave the Service [Visit](#) Profile field blank.

Generate (2) - For new [visits](#) to be generated for each piece of equipment on the new [quotation](#), for the [quotation's](#) duration

This may be a more extensive series of [visits](#) than that set up by Copy. You have to make an entry in the Service [Visit](#) Profile field.

None (3) - If no [visits](#) are to be set up

In this case, leave the Service [Visit](#) Profile field blank.

Service Visit Profile

Leave this field blank if you selected **Copy** or **None** in the Service [Visits](#) field.

If you selected **Generate** in the Service [Visits](#) field, enter a valid [scheduled visit profile](#). The software will use this to generate scheduled service [visits](#) for each piece of equipment on the new [quotation](#).

You can use the prompt facility on this field to select from the [Scheduled Visit Profile](#) pop-up.

Functions

Process Later (F13)

Use this to generate the new [quotation](#) at a later time by running the batch [job](#) Generate Deferred Request Quotes from [Contract](#).

Process Now (F22)

Use this to generate the new [quotation](#) immediately.

Select the **Process Now (F22)** to generate the [quotation](#) and leave the [task](#).

Alternatively, select **Process Later (F13)** to generate the [quotation](#) at a later time. You will be notified that the request has been logged. Select **Exit (F3)** to leave the [task](#).

Generate Deferred Request Quotes from Contracts [24/EQC]

Use this [task](#) to generate [quotations](#) from existing [service contracts](#), using stored requests.

This [task](#) is a batch [job](#), which you submit to perform the processing. It takes outstanding requests for [quotations](#) from [contracts](#) (made through the Request Quotes from [Contracts task](#)) and generates [contract quotations](#). It copies the [contract](#) header and [contract](#) equipment from the based-on [contract](#) to the new [quotation](#), and either copies or generates the service schedule records for the new [quotation](#).

Select **Confirm Submit (F8)** to submit the batch [job](#).

Global Price Update [25/EQC]

Use this [task](#) to apply percentage price increases, or decreases, to selected groups of product families, customers or [contracts](#).

You can select the [contracts](#) you want to update by price code or by mantle code, or both.

You can run the [task](#) in a test mode initially. Then, once you have checked the results in the report it produces (showing the current and new prices), you can run the [task](#) in update mode.

[Contracts](#) are price protected by their [term](#). This [task](#) does not override that. If you apply a global price change, it may generate a new dated price list for a [contract](#), but it will not become effective until the end of the [term](#) even if the price list has an effective date prior to the end of the [term](#).

Note: *There is no provision for updating [contract visit](#) charges. Only service, rental and copy charges can be updated.*

Global Price Update Detail Window

To display this window, select the Global Price Update [task](#).

Use this window to specify the price update you want to perform and the [models](#) it is to affect.

You must complete at least one of the seven selection fields (three [contract](#) selections and four price change selections).

Fields

Effective From Date

Enter or select the date (format DDMMYY) on which the update is to come into force.

[Contract Selection](#)

Mantle Code

You can optionally enter a valid mantle code.

Alternatively, use the prompt facility to select from the MANT SS/V3 Mantle Groupings pop-up.

The software compares the code you enter here with the mantle code set up on the [contract](#) header. If they match, that [contract](#) is selected for the price update.

Price Code

You can optionally enter a valid price code.

Alternatively, use the prompt facility to select from the Global Price Increase Code pop-up.

The code you enter is matched against the global price code set up on the Service Parameters pop-up. If they match, that [contract](#) is selected for the price update.

Caution: Code 00 is a system code and is not for general use.

Contract Type

You can optionally enter a valid [contract type](#).

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

If you enter a [contract type](#), the price update selection is limited to [contracts](#) of that type.

Currency Code

You can optionally enter a currency code.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

If you enter a currency, the price update selection is limited to [contracts](#) with that currency.

[Price Change Selection](#)

Division

You can optionally enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

If you enter a [division](#), the price update selection is limited to that [division](#). If you leave this field blank, all [divisions](#) within the other selection criteria will be included.

Model Group

You can optionally enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

If you enter a [model](#) group, the price update selection is limited to that [model](#) group. If you leave this field blank, all [model](#) groups within the other selection criteria will be included.

Model Sub-grp

You can optionally enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

If you enter a [model](#) sub-group, the price update selection is limited to that [model](#) sub-group. If you leave this field blank, all [model](#) sub-groups within the other selection criteria will be included.

Model

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

If you enter a [model](#), the price update selection is limited to that [model](#). If you leave this field blank, all [models](#) within the other selection criteria will be included.

Service Charge

Enter a percentage in the range 0.01 to 999.99, positive or negative.

You can leave this field blank, but one of the three percentage fields must hold a value other than .00.

Rental Charge

Enter a percentage in the range 0.01 to 999.99, positive or negative.

You can leave this field blank, but one of the three percentage fields must hold a value other than .00.

Price per Copy

Enter a percentage in the range 0.01 to 999.99, positive or negative.

You can leave this field blank, but one of the three percentage fields must hold a value other than .00.

Update Contract Conditions

Use this checkbox as follows:

Unchecked (default) - Not to perform an update on live files

The results of the changes are written to a work file, and a report is produced listing current prices alongside your proposed changes.

Checked - To perform the update on live files

The software updates the service, rental and price per copy charges on the [Contract Conditions](#) pop-up to take account of the percentage changes you specified above.

Select **Submit Job (F8)** to submit the [job](#) for processing and leave the [task](#).

Contract Credit Selection [27/EQC]

Use this [task](#) to identify any [contracts](#) which have been [terminated](#) before their [contracted](#) expiry date, and which may therefore require a credit. It will also select expired [contracts](#) that need a retrospective credit.

To [terminate](#) a [contract](#), change the [contract's](#) End Date field on the [Contract](#) Header Maintenance window.

To [terminate](#) a piece of equipment before its expiry date, if the [contract](#) is not header priced, re-set the Remov Dt (removal date) field on the [Contract](#) Equipment Maintenance Detail window for any selected machine.

You have to run this [Contract](#) Credit Selection [task](#) before you can use the Maintain [Contract](#) Credits [task](#), which is described in the Invoicing chapter of this product guide.

[Contract](#) Credit Selection does the following:

- It checks both pending and actual invoices. Pending invoice records will not produce a credit, but the software will re-calculate the value to ensure that the correct value is used when the invoice is produced.

Note: *If there are pending invoice records on EQP44, but no invoice re-calculation is involved, remove the equipment via the Maintain [Contracts](#) [task](#). The Generate and Print [Contract](#) Invoices [task](#) will clear the records from EQP44 on the removal date specified.*

Note: *Do not attempt to use [contract](#) credit functionality, as no invoice amount will need to be credited.*

- It puts the selected invoices in a work file, together with the expected credit and re-invoice values; these are based on the [termination](#) date plus the number of days defaulted from the [Termination](#) Notice in Days field on the [Contract Type](#) Maintenance window.
- It produces a report of all the records in the work file that need editing or acceptance. The Maintain [Contract](#) Credits [task](#) provides details of the processing you need to perform after you have produced the [Contracts](#) Awaiting Edit and Acceptance of Credits/Re-invoices reports.

[Contract](#) Credits

You can produce credits at any time, to refund part, or all, of a [contract](#) invoice, and to cancel any pending invoice records.

You select the [contract](#), or the invoice, or the pending [invoice period](#) from/to. You can amend the selected record(s) to affect the operative date and value(s) involved. You can discard the record, give a full or partial credit, or credit the original charge and re-invoice a different amount.

The resultant invoices and credit notes are produced when you next run the Generate and Print [Contract Invoices](#). Any cancelled pending invoice records are removed from the work file at the same time.

Selection of Contracts for Credit Window

To display this window, select the [Contract Credit Selection task](#).

Use this window to specify the [contracts](#) you want to check for issuing credits.

Fields

Branch

This field will default to the current [branch](#). You can change it to any [branch](#) to which you are authorised, or to all [branches](#) (*A) if you have blanket [branch](#) authority.

You can use the prompt facility on this field to select from the [Branch](#) Selection pop-up.

If you only enter the [branch](#) and the [termination](#) date, all [contracts terminating](#) on or before this date will be selected.

Contract Number

Enter a [contract](#) number to select a specific [contract](#) for credit, or leave this field blank to select all [contracts](#). This includes pending, active, deleted and expired [contracts](#) which have been priced or invoiced or both.

If you enter a [contract](#) number, you also need to enter a [contract type](#) and date.

Contract Type

Enter a [contract type](#).

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

Contract Date

Enter or select the start date of the [contract](#).

If you are selecting an expired or deleted [contract](#) for credit, you only need to enter the number, type and date.

Invoice Number

Enter the invoice number (in the format Innnnnn) to select a [contract](#) that has been invoiced and requires credit. Leave this field blank to select all invoices for the [contract](#) you have entered above.

Contracts Terminating on or Before

This defaults to the current date, on or before which credits for [terminating contracts](#) are to be processed. You can substitute a later, but not an earlier, date.

Press Enter to validate your entries and then select **Submit (F8)** to submit the [job](#) for processing.

The batch [job](#) produces reports entitled [Contracts](#) Awaiting Edit and Acceptance of Credits/Re-invoices.

Change Quotation Start Date [28/EQC]

Use this [task](#) to change the start date of a [contract quotation](#). This operation can only be performed at [Contract Quotation](#) stage and allows the dates associated with a [contract](#) to be moved along in time.

Example 1

[Contract](#) Start 1071201 (1/12/07)

Next [term](#) start 1/12/07 End 30/11/08 NTSD = 1

If new [quotation](#) start date is 17/12/07, the dates will become:

[Contract](#) Start 1071217 (17/12/07)

Next [Term](#) Start 17/12/07 End 16/12/08 NTSD = 17

In this case, the assumption is that the Next [Term](#) Start of 01 is not deliberate and relates to billing at the anniversary of the [contract](#), not a specific choice of the 1st of the month. This assumption will be made in all cases where the NTSD is the same as the start day of the [quotation](#).

Example 2

[Contract](#) Start 1071201 (1/12/07)

Next [term](#) start 15/12/07 End 30/11/07 NTSD = 15

If new [quotation](#) start date is 17/12/07, the dates will become:

[Contract](#) Start 1071217 (17/12/07)

Next [Term](#) Start 15/01/08 End 16/12/08 NTSD = 15

In this case, as the next [term](#) start is set to 15, it is retained along with the co-requisite logic. This assumption will be made for all cases where the NTSD is different from the old start date of the [quotation](#).

Only equipment on the [contract](#) with added dates of prior to or equal to the old [contract](#) start date will be changed. For example, if the [contract](#) is set up starting in May, with additional [models](#) added in for September, and the [contract](#) start date is changed to be June, only the May [models](#) will be changed. However, if the old [contract](#) start date is May and there is equipment starting in May and September, if the [contract](#) start date is moved to October, both lots of [models](#) will be moved to start the [contract](#) in October.

Billed [contracts](#) cannot have their start date changed.

If [contracts](#) have multiple conditions records, only those prior to or equal to the new [contract](#) start date will be changed to be the new start date.

Change Quotation Date Customer Window

To display this window, select the Change [Quotation](#) Start Date [task](#).

Use this window to select the customer to which the [quotation](#) belongs.

Fields

Account Number

Enter an existing customer account.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Account Address

Enter an address sequence in conjunction with a customer. This combination must already exist.

Enter or select a customer account and address sequence and then press Enter to display the Customer [Quotation](#) List window.

Customer Quotation List Window

To display this window, enter or select a customer account and address sequence and then press Enter on the Change [Quotation](#) Date Customer window.

Options

Select

Use this to display the Change [Quotation](#) Start Date pop-up.

Enquiry

Use this to go to the [Contract](#) Header Enquiry window (see the Enquiry chapter of this product guide for further information).

Select a [quotation](#) to display the Change [Quotation](#) Start Date pop-up.

Change Quotation Start Date Pop-up

To display this window, select a [quotation](#) on the Customer [Quotation](#) List window.

Fields

New Start Date

Enter or select the date to which the [contract](#) start should be changed.

The date entered cannot be prior to the current date.

Press Enter to validate the date and then select **Update (F8)** to submit the [job](#) that changes the [quotation](#) start date.

Report on Expired Contracts [29/EQC]

This report will list all equipment with a number of warranty units entered and will estimate if the warranty has expired.

Use the report to decide if the [contract](#) is to expire; the system will not automatically cause the [contract](#) to expire.

Contracts Due to Expire Report Window

To display this window, select the Report on Expire [Contracts task](#).

Fields

Select Expiration Date

Enter or select the date to be used to estimate the usage of the equipment.

Select **Submit (F8)** to submit a [job](#) to produce the report.

Report on Contract Audit [30/EQC]

Use this report to check that all [contracts](#) eligible for billing have been billed. There is no need to enquire on each individual [contract](#).

The report lists any unbilled [contracts](#), with their start date, attached [models](#) and [serial numbers](#), and other details.

Contract Audit Report Window

To display this window, select the Report on [Contract](#) Audit [task](#).

Fields

Report All Non Invoiced Equipment on Contracts Starting On/Before

The report will include equipment on all [contracts](#) starting on or before the date you enter or select here.

Select **Submit (F8)** to submit a [job](#) to produce the audit report.

Chapter 6 Operations Maintenance

Maintain Technician [1/EQM]

Use this [task](#) to maintain the details of all technicians employed within the workshop. Equipment Servicing uses the technician details to:

- Link a technician with a stock [location](#), so that you can generate inventory movements against that stock [location](#) when the technician uses parts
- Link a technician with a region, for reporting purposes
- Record a technician's absence status, and optionally prevent Equipment Servicing from assigning this technician to new [jobs](#)
- Calculate the [cost](#) of a technician's time on each service [job](#)
- Distinguish between grades of technician, who may [cost](#) different amounts

Technician Maintenance Selection Window

To display this window, select the Maintain Technician [task](#).

Use this window to select the technician you want to maintain.

Fields

Technician

Enter a technician code, using up to five characters.

Alternatively, use the prompt facility to select from Technician Selection pop-up.

Select a technician or enter a technician code and then press Enter to display the Technician Maintenance window.

Technician Maintenance Window

To display this window, select a technician or enter a technician code and then press Enter on the Technician Maintenance Selection window.

Use this window to specify the [location](#) and grade details for the selected technician.

Fields

Name

Enter the full name of the technician.

Address Lines 1-5

Enter the technician's address.

Geo. Code

Enter up to 10 characters in the two fields, to identify the technician's home [location](#) geocode.

Note: *The technician's geocode is for information only. Equipment Servicing uses the information from the Maintain FSG/Territory/Team [task](#) in technician allocation, not the geocode.*

Post Code

Enter the technician's postcode, in a format that complies with the Post Office regulations.

Telephone

Enter a telephone number for the technician.

Ext

Enter a telephone extension number for the technician.

Radio Page Code

Equipment Servicing does not use this field.

Supply Stockroom

Enter a supply stockroom.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

You must set up the stockroom in Inventory Management.

Note: *This field is only displayed if you use DRP with Equipment Servicing.*

The stockroom is the source for replenishing the technician's stock. It is the default supply stockroom used when ordering DRP parts during [job](#) reporting.

Technician Stockroom

Enter the technician's stock [location](#).

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

You must define this stockroom in Inventory Management and set up physical stocks. Within [call](#) logging/work control, [jobs](#) for the technician have sales orders raised for this stockroom.

Where you use DRP orders, set up an [Accounts Receivable](#) account with delivery code 001. In DRP maintenance, attach the account to the stock [location](#) as the sole customer for all Distribution orders to the [location](#).

Grading Code

Enter the grade of the technician.

Alternatively, use the prompt facility to select from the Technician [Job](#) Grade pop-up.

If the labour is being priced by grade, the grade entered here will be used to access the price.

Region

Enter the service region in which the technician works.

Alternatively, use the prompt facility to select from the Region pop-up.

Technician Account

Enter the account number and address sequence for the technician.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Note: You must set up the account in [Accounts Receivable](#). Equipment Servicing uses the account number as the customer for non-[job tasks](#).

Team Code

Enter the team for the technician.

Alternatively, use the prompt facility to select from the Team Description pop-up.

Absent Code

Enter a reason for the technician to be absent.

Alternatively, use the prompt facility to select from the Technician Absent Code pop-up.

If this field is anything other than blank, 0 or 1, automatic allocation ignores this technician for [calls](#).

If you create a non-[job task](#) in the technician's diary and give it an absent code, that code is displayed here.

Note: You must re-set the field manually; Equipment Servicing does not remove the absent code.

Workshop Technician

Use this checkbox as follows:

Unchecked - To use either the [contract](#) or non-[contract](#) rate from the price list, depending on the [job](#)

Checked - To use the workshop rate from the labour rate price list when you charge for the technician's time

Automatic Call Assignment

Use this checkbox as follows:

Unchecked - To exclude the technician from ACA

Checked - To include the technician in automatic [call](#) assignment (ACA) for his team, making sure the absent code is blank

Note: [Company profile](#), [model](#) and [job category](#) settings may also limit ACA operation.

Functions

Additional Details (F10)

Use this to display this Additional Details pop-up.

Skills Matrix (F14)

Use this to maintain the technician skills matrix.

Alternative Technician Maintenance (F16)

Use this to set up or maintain alternatives for this technician on the Alternative Technician Maintenance window.

Select **Update (F8)** to save your changes and return to the Technician Maintenance Selection window. Alternatively, press Enter to display the Technician Maintenance Additional Detail window.

Technician Maintenance Additional Detail Window

To display this window, press Enter on the Technician Maintenance window.

Use this window to add additional technician information.

Fields

Third Party Repairer

Use this checkbox as follows:

Unchecked - If the technician is not a third party technician

Checked - If the technician is a third party technician

Note: *If you check this field, you do not need to enter the technician and supply stockrooms.*

Default Technician

Supplier Number

Enter a valid supplier number for the third party technician.

Alternatively, use the prompt facility to select from the Supplier Search pop-up.

This is mandatory if the technician is flagged as a third party technician.

When entering a subcontract transaction, the user is prompted to select from a list of suppliers that correspond to third party repairers, **not** from a list of third party technicians.

Time Allocation Code

If the technician is a time allocation technician, enter a valid code.

Alternatively, use the prompt facility to select from the Select Time Allocation Code pop-up.

If you leave this field blank, as the [timesheets](#) are entered, the user will be prompted to enter the hours into the correct time buckets (base time, double time, etc.).

With time allocation, the time just has to be booked into one bucket and the [timesheet](#) system will allocate it to the required [jobs](#).

Normal Weekly Hours

Enter the normal weekly working hours for the technician.

The [timesheet](#) reconciliation process will warn the user if the number of hours booked is less than this figure.

Claim Rate

Enter a value to correspond with the [cost](#) per mile/km for the technician.

This is used (if present) within [timesheet](#) expenses entry to calculate the [cost](#) of the distance driven.

Charge Rate

Enter a value to correspond with the mileage charge rate for the technician. This is a memo field only.

Vehicle Reg. No

Enter the registration number of the technician's vehicle.

Vehicle Make

Enter the make of the technician's vehicle.

Vehicle Cubic Capacity

Enter the cubic capacity of the technician's vehicle.

Total Kims (Miles) to Date

This can be added or amended by the user and it is also maintained in [Timesheet](#) expenses entry as the engineer books distance driven.

If it is to be used as an annual total, it will need to be manually re-set at the start of the new year.

Functions

Additional Details (F10)

Use this to display this Additional Details pop-up.

Skills Matrix (F14)

Use this to maintain the technician skills matrix.

Alternative Technician Maintenance (F16)

Use this to set up or maintain alternatives for this technician on the Alternative Technician Maintenance window.

Select **Update (F8)** to save your changes and return to the Technician Maintenance Selection window.

Technician Maintenance Skills Matrix

To display this window, select **Skills Matrix (F14)** on the Technician Maintenance Additional Details window or the Technician Maintenance window.

Use this window to specify the [models](#), groups or [divisions](#) on which the technician has trained.

Fields

Model

Enter a [model](#) on which the technician can work.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

If the technician can work on all the [models](#) in a [model](#) sub-group, leave this field blank.

Division

Enter the [division](#) on which the technician can work.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

If you only enter a [division](#), the technician can work on all products within the [division](#).

Model Group

Enter the [model](#) group on which the technician can work.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up. If you only enter a [model](#) group, the technician can work on all products within the [model](#) group.

Model Subgroup

Enter the [model](#) sub-group on which the technician can work.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up. If you only enter a [model](#) sub-group, the technician can work on all products within the sub-group.

Job Cat

Enter the [job](#) the technician can do.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

This restricts the selection of the technician to the [jobs](#) defined within the [job category](#). If the technician can do all [jobs](#), leave this field blank.

Functions

Fold/Truncate (F13)

Use this to toggle the display to show more or fewer details.

Select **Update (F8)** to save any changes and return to the Technician Maintenance Selection window.

Alternative Technician Maintenance Window

To display this window, select **Alternative Technician Maintenance (F16)** on the Technician Maintenance Additional Details window or the Technician Maintenance window.

Use this window to specify all the technicians you can use as alternatives to the selected technician.

Note: You can only access this window if you left the Assign by Alternative Technician or Territory field unchecked in the [company](#) profile.

Fields

Technician

Enter the technician you want to define as an alternative.

Press Enter to add the technician to the list in the table.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Options

Delete

Use this to delete a technician from the list of alternative technicians.

Functions

Next (F9)

Use this to return to the Technician Maintenance Selection window so that you can select a different technician.

Select **Previous (F12)** to return to the Technician Maintenance window.

Maintain Reporting Hierarchy [2/EQM]

Use this [task](#) to set up a four-level hierarchy of codes that are used to report details of a potential problem, along with details of the resolution of that problem.

These codes are used within the [Call Logging task](#) and the [job reporting tasks](#).

The hierarchy works as a tree, with the top level being linked to lower levels a single level at a time.

Reporting Hierarchy Selection Window

To display this window, select the Maintain Reporting Hierarchy [task](#).

Use this window to specify the hierarchy you want to maintain.

The descriptive literals that are shown on the window are taken from the Equipment Servicing Codes/Parameters file, under major type FLTS.

The first one is the description that corresponds to code FLTC.

The second one is the description that corresponds to code SECT.

The third one is the description that corresponds to code SSCT.

These descriptions are only maintainable via the utilities version of the Maintain Codes/Parameters [task](#), as the first character of the description of FLTS has an *.

Fields

Main Area

Enter a valid 3-character top-level hierarchy code.

Alternatively, use the prompt facility to select from the [Model](#) Reporting Level 1 pop-up.

If you wish to maintain the second levels of the hierarchy that are linked to this top level, press Enter with only this field completed.

Sub Area

Enter a valid 3-character second-level hierarchy code.

Alternatively, use the prompt facility to select from the [Model](#) Reporting Level 2 pop-up.

If you wish to maintain the third levels of the hierarchy that are linked to the specific main area/sub area combination, press Enter with only the top two field completed.

Problem

Enter a valid 3-character third-level hierarchy code.

Alternatively, use the prompt facility to select from the [Model](#) Reporting Level 3 pop-up.

If you wish to maintain the bottom levels of the hierarchy that are linked to a specific main area/sub area/problem combination, press Enter with all three fields completed.

Functions

Enquiry (F14)

Use this to display the Fault Hierarchy Window pop-up.

Press Enter to display the Reporting Hierarchy Maintenance window.

Fault Hierarchy Window Pop-up

To display this window, select **Enquiry (F14)** on the Reporting Hierarchy Selection window.

Select **Previous (F12)** to return to the Reporting Hierarchy Selection window.

Reporting Hierarchy Maintenance Window

To display this window, enter a valid combination of fields and then press Enter on the Reporting Hierarchy Selection window.

Use this window to define the lower level codes for the selected level.

The top of the window shows the selections from the previous window.

It also displays the level of the hierarchy you are currently maintaining.

Fields

Code

Enter a valid code for the specific level.

Alternatively, use the prompt facility to select from the appropriate pop-up.

Level 2 codes are validated against the Codes/Parameters file under code SECT.

Level 3 codes are validated against the Codes/Parameters file under code SSCT.

Level 4 codes are validated against the Codes/Parameters file under code CORA.

Description

If you use the prompt facility on the Code field, the code description will be returned from the Equipment Servicing Codes/Parameters file, but you can override this with a description specific to its use in this hierarchy position.

Options

Amend

Use this to amend the description against a specific code.

Delete

Use this to delete a code from the hierarchy.

You cannot delete a code if lower level codes exist against it in the hierarchy.

Enter an appropriate code for this strand of the hierarchy and then press Enter. When you have made all the required changes, you can select **Exit (F3)** to leave the [task](#).

Maintain Model/Rep. Hierarchy Relationship [3/EQM]

Use this [task](#) to define the top-level codes that can be assigned to various levels within the [model](#) hierarchy.

Within [call](#) logging, when you are prompted for a top-level code, you are only shown the ones applicable to the [model](#) either in its own right or as part of the [model](#) hierarchy.

Model/Rep. Hierarchy Selection Window

To display this window, select the Maintain [Model/Rep. Hierarchy Relationship](#) [task](#).

Use this window to specify the territory you want to maintain.

Fields

Division

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

A [division](#) must also be entered.

Model Sub-Group

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

A valid [division](#) and [model](#) group must also be entered.

Model Number

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

If a [model](#) is entered, the other options on the [model](#) hierarchy are optional.

Job Category

You can optionally enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Copy Based On

These fields must correspond to a valid reporting structure.

They must be different from the fields at the top of the window for which the new reporting structure is being created.

Division

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

A [division](#) must also be entered.

Model Sub-Group

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

A valid [division](#) and [model](#) group must also be entered.

Model Number

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

If [model](#) is entered, the other options on the [model](#) hierarchy are optional.

Job Category

You can optionally enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Press Enter to display the [Model](#)/Rep. Hierarchy Maintenance window.

Model/Rep. Hierarchy Maintenance Window

To display this window, enter valid details and then press Enter on the [Model](#)/Rep. Hierarchy Selection window.

Use this window to define the [job](#) reporting codes that are applicable to the [model](#) hierarchy.

Fields

Fault

Enter a fault code.

Alternatively, use the prompt facility to select from the pop-up for the appropriate level of the hierarchy.

Options

Delete

Use this to remove a code combination from a specific point in the [model](#) hierarchy.

Enter or select a code and then press Enter to update. When you have added all the code combinations that are applicable to this level in the [model](#) hierarchy, select **Exit (F3)** to leave the [task](#).

Maintain Job Category [4/EQM]

Use this [task](#) to define and maintain all your [job](#) categories.

A [job category](#) code defines the type of [task](#) the technician performs when repairing or maintaining the equipment, (service, and fit part).

Together with the [contract type](#), you use the [job category](#) as the basis for deciding whether you charge for the [task](#). You set up the details of whether to charge, and how much to charge, in the [cover type/job category](#) charge matrix.

Implications

You use [job](#) categories to log [jobs](#) and create planned maintenance schedules for [contracts](#). Equipment Servicing uses the information associated with a [job category](#):

- With [contract type](#) data, to make up the [cover type/job category](#) charge matrix, to determine if you charge for [cost](#) elements in a [call](#)

[Cost](#) elements are labour hours, mileage charges, travel hours, miscellaneous [costs](#) and parts used, by four user-defined types (major, minor, consumables and supply items).

Job Category Maintenance Selection Window

To display this window, select the Maintain [Job Category task](#).

Use this window to specify a [job category](#) to maintain.

Fields

Job Category

Enter the [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Enter or select a [job category](#) and then press Enter to display the [Job Category](#) Financial window.

Job Category Financial Window

To display this window, enter or select a [job category](#) and then press Enter on the [Job Category](#) Maintenance Selection window.

Use this window to define the financial information for the selected [job category](#).

Fields

Job Category Description

Enter the description for the [job category](#).

Close Job after 1st Invoice

Use this checkbox as follows:

Unchecked - If you do not want to close the [jobs](#) automatically after producing the first invoice

Checked - To close the [job](#) automatically once you have produced an invoice

You normally use this for consultancy companies, and other time and materials (T&M) businesses, where you only invoice a [job](#) once it is complete.

Note: Once you have produced the first invoice, the [job](#) closes and you cannot produce any more invoices at that level.

Income Deferred

Use this checkbox as follows:

Unchecked - To post income directly to profit and loss accounts within the [General Ledger](#)

Checked - To defer income from this [job](#) type

Invoicing/Capitalisation

Select one of the following:

1 - To raise invoices once all [job](#) details are closed

2 - To raise invoices once this particular [job](#) detail is closed

3 - To raise invoices on demand

Disable Transfer Methods

Use these checkboxes as follows:

Unchecked - If you can use a [transfer method](#) for this [job](#) type

Checked - If you cannot use a [transfer method](#) for this [job](#) type

Transfer Method

Enter the [transfer method](#).

Alternatively, use the prompt facility to select from the [Transfer Method](#) pop-up.

For details on how each [transfer method](#) works, refer to the following table.

Transfer Method	Initial Posting	Transfer To	Transfer Process Req'd	Release Process Req'd	Close Process Req'd
0	P&L	n/a	n/a	n/a	n/a
1	WIP	P&L	YES	NO	NO
2	WIP	P&L	YES	YES	NO
3	WIP	P&L	YES	YES	YES

	Transfer Method	Initial Posting	Transfer To	Transfer Process Req'd	Release Process Req'd	Close Process Req'd
4		WIP	FA	YES	NO	NO
5		WIP	FA	YES	YES	NO
6		WIP	FA	YES	YES	YES
7		WIP	n/a	n/a	n/a	n/a
8		WIP	P&L/FA	YES	n/a	Optional

Key:

[WIP](#): Work in Progress

P&L: Profit and Loss

FA : Fixed Assets

Initial Posting - The place in [General Ledger](#) to which you want to post [costs](#) when they are initially posted to the [General Ledger](#)

Transferred To - The place to which [costs](#) are transferred when they are released from [WIP](#)

Transfer Process Required - Whether you need to initiate the transfer via a [task](#) or [tasks](#)

Release Process Required - Yes indicates that the transfer process only transfers those [costs](#) defined using the Release [Jobs task](#). No indicates that the transfer process processes all [costs](#) still in [WIP](#).

Close Process Required - Yes indicates that you can only run the Release [Jobs task](#) for closed [jobs](#). No indicates that you do not need to close the [job](#) first.

Note: To take [costs](#) with a [transfer method](#) of 7 out of [WIP](#), you must change the [transfer method](#).

India parts tax only

India only

Use this checkbox as follows:

Unchecked - Parts Tax Only not required

Checked - Parts Tax Only required

Functions

Expense Types (F19)

Use this to display the [Job](#) Type [Expense Type](#) Update window.

Complete the required fields and then press Enter to display the [Job Category](#) Structure window.

Job Category Structure Window

To display this window, enter the required details and then press Enter on the [Job Category](#) Financial window.

Use this window to define the [job](#) structure details for the [job category](#).

Fields

Category Type

Enter one of the following:

- 01 - Field Service
- 02 - Field Service Planned Maintenance [Job](#)
- 03 - Field Service Warranty [Job](#)
- 04 - Workshop Warranty [Job](#)
- 05 - Workshop Rebuild
- 06 - Service Exchange
- 07 - Workshop Component [Job](#)
- 08 - Workshop Planned Maintenance [Job](#)
- 09 - [Cost Job](#)

Alternatively, use the prompt facility to select from the [Job](#) Classification pop-up.

At various points in the system, you can change the [job category](#).

The following rules apply:

- 1 It is not possible to change a workshop job category to a field service job category and vice versa.
- 2 It is not possible to change a job to or from a service exchange job.
- 3 It is not possible to change a job to a cost job.

Default Category

You must define a default [job category](#) for each category type.

These are required throughout the system when Equipment Servicing needs to retrieve a specific [job category](#). You can only define one default [job category](#) for each type.

If this is the default for this [job](#) type, enter the category, in the range 1 to 9, or A, B or C. If this is not a default, enter 0.

The categories are as follows:

- A - Workshop Breakdown
- B - Workshop Warranty
- C - Warranty Claim

- D - Workshop Repeat
- E - Workshop Specialist
- 0 - Not a default
- 1 - Breakdown
- 2 - [Installation](#)
- 3 - Withdrawal
- 4 - Return [Job](#)
- 5 - Repeat [Job](#)
- 6 - Specialist Repeat
- 7 - Return for Knowledge
- 8 - Return for Other Reasons
- 9 - Warranty [Call](#) (Field)

You can use the prompt facility on this field to select from the Default Category pop-up.

Category Discipline

Enter a discipline code associated with the [job category](#).

Alternatively, use the prompt facility to select from the [Job](#) Discipline pop-up.

The discipline is a reporting code that can be used for the [job](#).

Job Category Different at Sub-job Level

When a [job](#) structure is being set up, either within [job](#) structure maintenance or in [Call](#) Logging/Work Control, this field is checked to ensure that the user can maintain the [job category](#) at [sub-job](#) level.

Use this checkbox as follows:

Unchecked - To prevent the [job category](#) from being changed for a specific [sub-job](#) within a [job](#)

Checked - To allow the [job category](#) to be changed for a specific [sub-job](#)

Job Category Different at Task Level

When a [job](#) structure is being set up, either within [job](#) structure maintenance or in [Call](#) Logging/Work Control, this field is checked to ensure that the user can maintain the [job category](#) at [task](#) level.

Use this checkbox as follows:

Unchecked - To prevent the [job category](#) from being changed for a specific [task](#) within a [job](#)

Checked - To allow the [job category](#) to be changed for a specific [task](#)

Technician Different at Sub-job Level

When a technician is assigned to the prime [job](#), this field is checked to see if a different technician can be manually assigned at [sub-job](#) level.

Use this checkbox as follows:

Unchecked - To prevent a different technician being assigned at [sub-job](#) level

Checked - To allow a different technician to be assigned at [sub-job](#) level

Technician Different at Task Level

When a technician is assigned to the prime [job](#), this field is checked to see if a different technician can be manually assigned at [task](#) level.

Use this checkbox as follows:

Unchecked - To prevent a different technician from being assigned at [task](#) level

Checked - To allow a different technician to be assigned at [task](#) level

Job Category Normally Chargeable

Use this checkbox as follows:

Unchecked - If the [job category](#) is not normally chargeable

Checked - If the [job category](#) is normally chargeable

The actual chargeability of the [job](#) is decided by the [cover type/job category](#) charge matrix. For further information, see the Maintain [Cover Type/Job Category](#) section.

Parts Fault Reporting Mandatory

This field will be used on windows where parts are reported on a [job](#). This will force the user to enter codes against the [job](#) if parts have been booked.

Use this checkbox as follows:

Unchecked - To allow [job](#) completion without reporting codes

Checked - To force reporting code entry at [job](#) completion

Model Different at Sub Job

When a [job](#) structure is being maintained, this field is checked to see if a different [model](#) can be manually assigned at [sub-job](#) level.

Use this checkbox as follows:

Unchecked - To prevent a different [model](#) from being assigned at [sub-job](#) level

Checked - To allow a different [model](#) at [sub-job](#) level

Model Different at Task

When a [job](#) structure is being maintained, this field is checked to see if a different [model](#) can be manually assigned at [task](#) level.

Use this checkbox as follows:

Unchecked - To prevent a different [model](#) from being assigned at [task](#) level

Checked - To allow a different [model](#) at [task](#) level

Include Category in Repeat Call Calculation

Use this checkbox as follows:

Unchecked - To exclude the category from the repeat [call](#) calculation

Checked - To include the category in the repeat [call](#) calculation

When you log a [call](#), Equipment Servicing checks repeat [calls](#). They depend on the number of days, or the units used since the last reported service [call](#) to the equipment. You define the days and units between [calls](#) on the volume segment, linked directly to a specific [model](#).

Include Category in Automatic Call Assignment

Use this checkbox as follows:

Unchecked - Not to include [calls](#) of this [job category](#) in the ACA of technicians to [calls](#)

Checked - To include [calls](#) of this [job category](#) in the ACA of technicians to [calls](#)

Note: [Company](#) profile settings and settings for the [model](#) and technician also limit ACA operation.

Note: Equipment Servicing does not currently support the use of ACA.

Average Hours Factor

This field is for future development.

Functions

Model Types (F14)

Use this to display the [Job Category Model](#) Type Maintenance window.

Expense Types (F19)

Use this to display the [Job](#) Type [Expense Type](#) Update window.

Complete the required fields and then press Enter to display the [Job category](#) Transaction window.

Job Category Transaction Window

To display this window, complete the required fields and then press Enter on the [Job Category](#) Structure window.

Use this window to define the [job](#) transaction details for the [job category](#).

Fields

Equipment on Header

This field will be used by the programs that roll up [cost](#) values to an appropriate level in the [job](#) to prevent the final roll up to the prime [job](#) record.

This will be used for [job](#) categories where the [model](#) on the original [job](#) is not a real [model](#) and should not have [costs](#) associated with it.

This field defaults to **checked** and is mandatory.

The field can only be left **unchecked** if the [job category](#) has the ability to have different [models](#) at [sub-job](#) and has its own default [model](#) number.

Use this checkbox as follows:

Unchecked - To prevent roll up to prime [job](#)

Checked - To roll up [costs](#) to the prime [job](#)

Customer Order Number Mandatory

This field is checked in [call](#) logging to ensure that, if necessary, a customer order number is added on the [job](#).

If this field is left **unchecked**, [call](#) logging checks the entry on the customer.

Use this checkbox as follows:

Unchecked - If the customer order number is not mandatory for this [job category](#) but may be mandatory for a specific customer

Checked - If the customer order number is mandatory at [call](#) logging

Default Model Number

The [model](#) entered here will be used in [call](#) logging as the default [model](#) for this specific [job category](#).

It is not mandatory, but if entered, it must be a valid [model](#).

You can use the prompt facility on this field to select from the [Model](#) Master Scan pop-up.

Meter Readings to be Requested

This field is checked in the [Timesheet](#) Entry and [Job](#) Completion [tasks](#) to ensure that meter readings are entered for the [job](#) if necessary before it is closed and invoiced.

Use this checkbox as follows:

Unchecked - If meter readings are not to be requested

Checked - If meter readings are required before [job](#) completion

Hours Reporting Allowed

If this field is left **unchecked**, it will not be possible to enter [timesheet](#) hours for this [job category](#).

Use this checkbox as follows:

Unchecked - If [timesheets](#) cannot be entered for [jobs](#) within this category

Checked - If [timesheets](#) can be entered for [jobs](#) within this category

Parts Reporting Allowed

If this field is left **unchecked**, it will not be possible to enter parts for this [job category](#).

Use this checkbox as follows:

Unchecked - If parts cannot be entered for [jobs](#) within this category

Checked - If parts can be entered for [jobs](#) within this category

Direct Transaction Expenses Allowed

If this field is left **unchecked**, it will not be possible to enter direct transactions for this [job category](#).

Use this checkbox as follows:

Unchecked - If direct transactions cannot be entered for [jobs](#) within this category

Checked - If direct transactions can be entered for [jobs](#) within this category

Distance/Travel Reporting Allowed

If this field is left **unchecked**, it will not be possible to enter distance driven (miles or kilometres) or travel time for this [job category](#).

Use this checkbox as follows:

Unchecked - If distance/travel cannot be entered for [jobs](#) within this category

Checked - If distance/travel can be entered for [jobs](#) within this category

Staged Payments Allowed

The [Stage Payments task](#) will not allow access to [jobs](#) that have this field **unchecked** at the prime level. Even if the [job](#) has different [job](#) categories at [sub-job](#) or [task](#) level, the [Stage Payments task](#) will check the prime [job](#) only.

Use this checkbox as follows:

Unchecked - If [stage payments](#) are not allowed

Checked - If [stage payments](#) can be entered for [jobs](#) within this category

Failure Codes Mandatory at Call Reporting

If this field is **checked**, [job](#) completion will not be allowed if failure codes have not been entered for [jobs](#) within this category.

Users are prompted to enter the codes at [timesheet](#) entry (if the technician fields the [job line](#) as complete) and their existence is checked in the [Job Completion task](#) if the [job](#) is being set to Complete.

Use this checkbox as follows:

Unchecked - If failure codes are not mandatory for [jobs](#) within this category

Checked - If failure codes must be entered on [jobs](#) within this category

Invoicing Allowed if PO Order Not Received

If this field is **checked**, it will be possible to close down [jobs](#) within this category without the purchase order being received and therefore included in the [job](#) billing transactions.

Use this checkbox as follows:

Unchecked - If purchase orders must be received before [jobs](#) within this category can be closed

Checked - To allow [jobs](#) within this category to be closed when the purchase order is still outstanding

Immediate Release of Parts and Order Creation

This field will be used automatically when [jobs](#) are created from the template either in the [Call Logging task](#) or by converting [quotations](#) to [jobs](#). If parts orders are to be created, if this field is **checked**, the parts orders will be created.

If the field is left **unchecked**, the parts orders will have to be created manually from within [job](#) structure maintenance.

Use this checkbox as follows:

Unchecked - To create parts orders manually

Checked - To create parts orders automatically as the [job](#) is created

Immediate Generation of Pick Required

This field is available if process.connect is used to produce pick notes automatically as orders are created.

The use of the process is optional.

Use this checkbox as follows:

Unchecked - If pick notes are not to be produced automatically

Checked - If pick notes are to be produced automatically as orders are created

Quotation Required

This is used within the [Call Logging task](#) to force an entry into the [Quotation](#) field.

Use this checkbox as follows:

Unchecked - If [quotations](#) are not mandatory for [jobs](#) within this category

Checked - If [quotations](#) are mandatory for [jobs](#) within this category

Use Customer Stockroom at Order Creation

If this field is left **unchecked**, the customer stockroom is used by the Order Create interface function to create the sales order.

If the field is **checked**, the parts order is for the technician or [branch](#) stockroom.

Use this checkbox as follows:

Unchecked - To use the system-generated stockroom for the parts sales order

Checked - To use the customer stockroom to create the sales order

Functions

Model Types (F14)

Use this to display the [Job Category Model](#) Type Maintenance window.

Expense Types (F19)

Use this to display the [Job](#) Type [Expense Type](#) Update window.

Complete the fields and then press Enter to display the [Job Category](#) Invoice window.

Job Category Invoice Window

To display this window, press Enter on the [Job Category](#) Transaction window.

Use this window to define the invoice detail for the selected [job category](#).

Fields

Credit Assessment Required

This is used by the two manual [Call](#) Logging programs to enforce the entry of a request code for credit assessment.

Use this checkbox as follows:

Unchecked - If credit assessment is not required on [jobs](#) within this category

Checked - If credit assessment is required on [jobs](#) within this category

Pending Invoice Review for Invoices

This is used by the Invoicing module to control whether a transactions needs to be manually released for invoicing after release in [Job](#) Completion.

Use this checkbox as follows:

Checked - If the transaction is to be forced through pending invoice maintenance for manual release to invoicing

Unchecked - If the transaction is to be automatically available for invoicing without the need for pending invoice maintenance

Formal Job Closure Required

Use this checkbox as follows:

Unchecked - If [jobs](#) within this category can be closed by use of the Complete [Jobs](#) batch [task](#)

Checked - If the manual [Job](#) Completion [task](#) is required for [jobs](#) within this category

Labour Cost List Override

Enter a valid labour [cost](#) list. This is used as an override [cost](#) list for the labour and travel time.

Note: The default labour [cost](#) list is in the [company](#) profile.

Actual Costs Posted During the Quotation Phase

This field is used within the [timesheet](#) system. If a [job](#) is still in the [quotation](#) stage, it is possible for a technician to book time to it. These [cost](#) transactions are then posted through the system.

Use this checkbox as follows:

Unchecked - If transactions cannot be booked before the quote is converted to a [job](#)

Checked - If transactions can be booked during the [quotation](#) phase

Actual Costs to Print on Quotation/Invoice

Use this checkbox as follows:

Unchecked - If only the transactions from the [job](#) will print on the invoice

Checked - If transactions from the [quotation](#) and the [job](#) will print on the invoice

Inv. Print Detail (0) Summary (1) or Partial (2)

This is used by the invoice print program to control the level of detail printed on [job](#) invoices.

Enter one of the following:

0 - Detail print

Each transaction will print as a separate line.

1 - Summary print

Transactions will be summarised as labour, parts, travel and expenses. One line is printed for each group.

2 - Partial print

Transactions will be summarised as labour, travel and expenses. One line is printed for each group. Parts will not be summarised and one line will be printed per transaction.

Print Zero Priced Invoice Lines

This field is used to suppress printing of any zero priced invoice lines.

Use this checkbox as follows:

Unchecked - Not to print zero priced lines

Checked - To print zero priced lines

Labour Utilisation Code

This is an analysis field that is written to labour [timesheet](#) transactions.

The entered value is validated against the Equipment Servicing Codes/Parameters file, type LABU.

Job Automatically Generated from Template

Use this checkbox as follows:

Unchecked - If the user will be prompted to select a template from a table of all templates that could be used for the [job](#)

Checked - If a template will be automatically selected to create a [job](#)

Cost to Complete

This field is used by the [AFI](#) interface to determine how GL postings are made. It is validated against the Equipment Servicing Codes/Parameters file, type [COST](#).

Parts Billed at Booking (1) or Job Close (2)

Enter one of the following:

1 - First time booking (default)

Parts are available for invoicing immediately after they have been confirmed as despatched in [Sales Order Processing](#) or after they have been booked in Equipment Servicing. The transactions appear as available for selection for invoicing in the interactive [Job Completion task](#).

2 - [Job Close](#)

Parts are not shown as available for invoicing in the [Job Completion task](#) until all [sub-jobs](#) and [tasks](#) within the prime [jobs](#) are at status 50. This may slow down invoice production and cash flow.

Parts Intrastat Reporting Required

Use this checkbox as follows:

Unchecked - If Intrastat records are not required for parts movements

Checked - If Intrastat records are required for parts movements crossing borders

Note: The [World Trade](#) movements are created using the [Equipment Servicing Disposal Movements task](#).

On Demand Commitments

Use this checkbox as follows:

Checked - If the commitment [costs](#) will be posted by the batch run of the commitment program

Unchecked - If the commitment [costs](#) will be updated interactively using the [Update Commitments task](#).

Allow Single (0) or Multiple (1) Job Entry

Use this to control the [call](#) logging system, where single mode indicates that one piece of equipment for a customer is logged in one session whereas multiple mode implies that many pieces of equipment at one customer [site](#) can be logged at the same time.

Enter one of the following:

0 - Single entry

Users are returned to the [Job](#) Creation window as a [job](#) is created ready for entry of a new [job](#).

1 - Multiple entry

Users are returned to the [Job](#) Selection window after a [job](#) is created.

Functions

Model Types (F14)

Use this to display the [Job Category Model](#) Type Maintenance window.

Expense Types (F19)

Use this to display the [Job](#) Type [Expense Type](#) Update window.

Press Enter to update and then select **Exit (F3)** to leave the [task](#).

Job Type Expense Type Update Window

To display this window, select **Expense Types (F19)** on any of the windows in this [task](#) on which it is available.

Use this window to maintain the [expense types](#) associated with this [job category](#).

Fields

Expense Type

Enter an [expense type](#).

You must include the [expense types](#) for [timesheets](#) and for [employee expenses](#) as set up in the [company](#) profile. If you do not, you cannot enter [timesheet](#) or [employee expenses](#) for this [job category](#).

You can use the prompt facility on this field to select from the Select [Expense Type](#) pop-up.

VAT Code

Enter the VAT code for this expense. This is a memo field only.

You can use the prompt facility on this field to select from the Select VAT Code pop-up.

Mark Up %

If the expense is chargeable, enter the percentage increase.

When you enter a mark-up for an [expense type](#) for a transaction ([timesheets](#), expenses or direct) with a currency other than the income currency, the mark-up is ignored. You must enter the charge value.

Options

Delete

Use this to delete an existing [expense type](#).

Select **Update (F8)** to update the data and return to the previous window.

Job Category Model Type Maintenance Window

To display this window, select **Model Types (F14)** on any of the windows in this [task](#) on which it is available.

Use this window to maintain the [model](#) types that can be used for a [job](#) of this specific [job category](#).

Fields

Model Type

Only [models](#) with the [model](#) types listed here will be available during [call](#) logging for this [job category](#).

Enter one of the following:

- 0 - Equipment
- 1 - Peripheral
- 2 - Component
- 4 - Internal [Model](#)
- 5 - Exchange Item
- 9 - Non-Active [Model](#)

Alternatively, use the prompt facility to select from the [Model](#) Type pop-up.

Options

Delete

Use this to delete an existing [model](#) type for this [job category](#).

Select **Update (F8)** to update the data and return to the previous window.

Maintain Cover Type/Job Category [5/EQM]

Use this [task](#) to define and maintain a [cover type/job category](#) charge matrix for all [job](#) categories. The [cover type/job category](#) charge matrix specifies the invoicing rules relating to each combination of [job category](#) and [cover type](#). It determines which elements are chargeable, whether overrides apply and which elements are not chargeable.

Concepts

You must set up a table of all the [job](#) categories allowed for each [cover type](#) (including *NO - no [cover type](#)). This ensures that you do not book the wrong type of work against a [contract](#) and tells Equipment Servicing whether to charge the labour, travel parts or miscellaneous [costs](#) to the customer.

Implications

You must define the [cover type/job category](#) charge matrix before you can despatch a technician to a [call](#), or log technician transactions. You can only enter the labour and travel hours, parts used and miscellaneous [costs](#) against [job](#) categories set up in a matrix with the [contract type](#) covering the piece of equipment on the technical report.

Note: You must define a set of [job](#) categories allowed for non-[contract](#) work against the special [cover type](#) code *NO, to allow billable entries for non-[contract](#) work.

The matrix is also important for the [job](#) pricing routines. Equipment Servicing processes each completed transaction and accesses the indicators for the appropriate [cover type](#) and [job category](#) combination, to decide whether to charge labour hours, miscellaneous [costs](#) and parts used to the customer.

Note: If a [cover type/job category](#) charge matrix does not exist when you log a [job](#), a warning is displayed. You can still log the [call](#), but you should correct the error before processing transactions.

Cover Type/Job Category Maintenance Selection Window

To display this window, select the Maintain [Cover Type/Job Category task](#).

Use this window to select the [cover type](#) for which you want to define the matrix.

Fields

Cover Type

Enter the [cover type](#), using three characters.

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Currency Code

Enter an existing currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Based On

To base a new matrix on an existing one, complete the following fields:

Based On Cover Type

Enter the existing [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Based On Currency Code

Enter the existing currency code.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Note: If you are using a different currency, you need to revise all fixed charge overrides for labour and travel labour.

Press Enter to display the [Cover Type/Job Category](#) Maintenance Detail window.

Cover Type/Job Category Maintenance Detail Window

To display this window, enter the selection details and then press Enter on the [Cover Type/Job Category](#) Selection window.

This window lists all [job](#) categories linked to the [cover type](#). Use the line of invoice fields above the table of [job](#) categories to enter the matrix information.

Note: In the [cover type/job category](#) charge matrix, Equipment Servicing highlights invoice field values with a fixed charge attached.

Fields

Note: To enter a [cover type/job category](#) charge matrix, enter a [job category](#), and check the appropriate invoice fields. To amend an existing line, select the line in the [job category](#) table. All the information is displayed at the top of the window for you to amend.

Job Category

Enter a [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Caution: Do not enter a job category and immediately select an existing job category. This places unnecessary record locks on the first job category.

Note: You set up item types to invoice in the Codes/Parameters file; you must classify a service part in the Product Type field in the Item Master file.

Note: If you make a copy based on another currency, you must convert any override charges into the new currency.

Fields

Invoice flags

Note: India only

No Invoice flag can be set to chargeable (1) for a Part Tax Only [job category](#).

Labour

Use this checkbox as follows:

Unchecked - Not to invoice for the labour hours (no fixed charge applies)

Checked - To invoice for the labour hours

You can set up fixed charge overrides by selecting **Pos.Cur. Charging Overrides (F14)** or **Charging Overrides (F16)**.

Miles/Klms

Use this checkbox as follows:

Unchecked - Not to charge for distance travelled

Checked - To charge for distance travelled

Note: The field heading is soft-coded and you can set up the required value in the Codes/Parameters file under type DIST.

Travel

Use this checkbox as follows:

Unchecked - Not to invoice for travel hours (no fixed charge applies)

Checked - To invoice for travel hours

You can set up fixed charge overrides by selecting **Pos.Cur. Charging Overrides (F14)** or **Charging Overrides (F16)**.

Misc

Use this checkbox as follows:

Unchecked - Not to invoice for miscellaneous charges

Checked - To invoice for miscellaneous charges

Note: *Miscellaneous charges include all direct transactions, subcontract items and [employee expenses](#) with the exception of distance travelled (miles or kilometres).*

Major

Use this checkbox as follows:

Unchecked - Not to charge for major parts

Checked - To invoice for major parts

To specify which parts to charge for, select **Pos.Cur. Charging Overrides (F14)** or **Charging Overrides (F16)**.

Minor

Use this checkbox as follows:

Unchecked - Not to charge for minor parts

Checked - To invoice for minor parts

To specify which parts to charge for, select **Pos.Cur. Charging Overrides (F14)** or **Charging Overrides (F16)**.

Supplies

Use this checkbox as follows:

Unchecked - Not to invoice for supply parts

Checked - To invoice for supply parts

To specify which parts to charge for, select **Pos.Cur. Charging Overrides (F14)** or **Charging Overrides (F16)**.

Consumab

Use this checkbox as follows:

Unchecked - Not to invoice for consumable parts

Checked - To invoice for consumable parts

To specify which parts to charge for, select **Pos.Cur. Charging Overrides (F14)** or **Charging Overrides (F16)**.

Options

Select

Use this to change the [job category](#) details.

The [job category](#) details are displayed for amendment in the Invoice fields.

Delete

Use this to remove a [job category](#) from the matrix.

Functions

Pos.Cur. Charging Overrides (F14)

Use this to display the Charging Overrides pop-up for the field on which your cursor is positioned. This can be any of the Invoice fields except for the Misc field.

Charging Overrides (F16)

Use this to display the Charging Overrides pop-up for labour, travel, major, minor, supplies and consumables, one after the other.

Select **Update (F8)** to save the information and return to the [Cover Type/Job Category](#) Maintenance Selection window.

Labour Charging Overrides Pop-up

To display this pop-up, select **Pos.Cur. Charging Overrides (F14)** on the [Cover Type/Job Category](#) Maintenance Detail window with your cursor on the Labour field.

Alternatively, select **Charging Overrides (F16)** on the [Cover Type/Job Category](#) Maintenance Detail window.

Use this pop-up to enter the fixed charges for the charging overrides.

Fields

The First 'n' Hours

Enter the number of hours for which this charge applies.

For a Minimum Charge

Enter the value to charge.

Note: You are allowed to have a value of 0. This allows you to give away the initial time on the [call](#) free of charge for certain [job](#) categories.

Eff. Date

Enter or select the date from which to make this charge.

Select **Accept (F8)** to save the information and return to the [Cover Type/Job Category](#) Maintenance window if you selected **Pos.Cur. Charging Overrides (F14)** or to display the Travel Charging Overrides pop-up if you selected **Charging Overrides (F16)**.

Travel Charging Overrides Pop-up

To display this pop-up, select **Pos.Cur. Charging Overrides (F14)** on the [Cover Type/Job Category](#) Maintenance Detail window with your cursor on the Travel field.

Alternatively, select **Charging Overrides (F16)** on the [Cover Type/Job Category](#) Maintenance Detail window and then select **Accept (F8)** or **Previous (F12)** on the Labour Charging Overrides pop-up.

Use this pop-up to enter the fixed charges for the charging overrides.

Fields

The First 'n' Hours

Enter the number of hours for which this charge applies.

For a Min. Charge

Enter the value to charge.

Note: You are allowed to have a value of 0. This allows you to give away the initial time on the [call](#) free of charge for certain [job](#) categories.

Eff. Date

Enter or select the date from which to make this charge.

Select **Accept (F8)** to save the information and return to the [Cover Type/ Job Category](#) Maintenance window if you selected **Pos.Cur. Charging Overrides (F14)** or to display the Parts Charging Overrides pop-up if you selected **Charging Overrides (F16)**.

Parts Charging Overrides Pop-up

To display this pop-up, select **Pos.Cur. Charging Overrides (F14)** on the [Cover Type/Job Category](#) Maintenance Detail window with your cursor on the Major, Minor, Supplies or Consumable field.

Alternatively, select **Charging Overrides (F16)** on the [Cover Type/Job Category](#) Maintenance Detail window and then select **Accept (F8)** or **Previous (F12)** on the Travel Charging Overrides pop-up.

The title of this pop-up changes according to the field for which you are maintaining the overrides.

Fields

Select Parts to Include

Enter one of the following:

- 0 - Not to display a table of parts for you to select the parts to override
- 1 - To display a table of parts for you to select the parts to override.

Select Parts to Exclude

Enter one of the following:

- 0 - Not to display a table of parts for you to select the parts to exclude from the override

- 1 - To display a table of parts for you to select the parts to exclude from the override

Select All Parts

Enter one of the following:

- 0 - If you do not want to select all parts for the override
- 1 - To select all parts for the override

Select **Accept (F8)** to save the information and return to the [Cover Type/ Job Category](#) Maintenance window if you selected **Pos.Cur. Charging Overrides (F14)** or to the next override pop-up if you selected **Charging Overrides (F16)**.

Parts Charging Overrides Item Table Pop-up

To display this pop-up, enter 1 in either the Select Parts to Include field or the Select Parts to Exclude field on the Parts Charging Override pop-up.

The literal at the bottom of the pop-up indicates whether you are including or excluding parts.

Fields

Select

Select records to be included, if ****INCLUDE**** is displayed, or to be excluded, if ****EXCLUDE**** is displayed. All item numbers highlighted will follow this rule.

Functions

Accept (F8)

Once the fields above are highlighted, select this to create the included/excluded table.

Enter the overrides and then select **Accept (F8)** to update. If you accessed this window by selecting **Charging Overrides (F16)**, the next override window is displayed; otherwise the [Cover Type/Job Category](#) Maintenance Detail window is displayed.

Maintain Job Template [6/EQM]

This [task](#) allows users to create standard templates for creating [jobs](#).

The templates will hold details of the structure of the [jobs](#), i.e. any associated [sub-jobs](#) and [tasks](#) along with the [budget](#) hours, parts and subcontract items required to perform the [tasks](#).

The templates are used either automatically or with a prompt in the various [call](#) creation [tasks](#).

Note: The [call](#) creation [tasks](#) are:

- [Call](#) Logging
- Equipment Book In

- Load Planned Maintenance [Jobs](#)
- Maintain Credit [Calls](#)

Job Template Maintenance Selection Window

To display this window, select the Maintain [Job](#) Template [task](#).

Use this window to enter or select the template you want to create or maintain.

If a new template is to be created, it can be created based on another template or based on an existing [job](#) (see later sections) or it can be set up from scratch.

If you are setting up from scratch, you can enter all the required fields below, including the effective date and template description. If only some of the fields are entered, the window will show a list of templates available for amendment.

Fields

Template Type

Enter a valid template type.

Alternatively, use the prompt facility to select from the Template Type pop-up.

This code is stored in the Equipment Servicing Codes/Parameters file, under type TEMT. It allows users to store different types of templates. The suggestion is that any that are sent out from a central [location](#) may be classed as global templates and ones maintained/changed locally may be classed as local templates.

The template type is one of the classifications that allow the user to select which template is to be attached to the [job](#).

Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

It is likely that the template required may be totally different on a planned maintenance [job](#) for a machine from that on, for example, a breakdown; therefore the [job category](#) is mandatory.

Division Code

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

This is the first of the fields that categorise the template for the [job category](#) to the [division](#) to which the [models](#) belong.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

This is the second of the fields that categorise the template for the [job category](#) to the [division](#) and [model](#) group to which the [models](#) belong. If a [model](#) group is entered, a valid [division](#) must also be entered.

Model Subgroup

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

This is the third of the fields that categorise the template for the [job category](#) to the [division](#), [model](#) group and [model](#) sub-group to which the [models](#) belong. If a [model](#) sub-group is entered, a [division](#) and [model](#) group must also be entered.

Model Number

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

As the [model](#) file holds the [division](#), [model](#) group and [model](#) sub-group, if the [model](#) is entered, the [division](#) etc. do not need to be.

Procedure

Enter a valid procedure.

Alternatively, use the prompt facility to select from the Procedure pop-up.

The procedures are held in the Equipment Servicing Codes/Parameters file under major type PROC. They are used to sub-divide further the type of template.

An example could be a car where there are various planned maintenance [jobs](#) with different parts etc required for each one.

The templates may be set up as PSV (Planned Service [Visits](#)) for a specific [model](#) e.g. Fiat Multipla.

However the procedures may be as follows:

12M

24M

36M

Each of these describes the different service requirements after 12 months, 24 months and 36 months of driving.

Effective Date

Enter or select a valid date on which the template becomes effective.

Template Description

Enter a template description, such as 12-month Service etc.

Functions

Copy from Template (F10)

Once the fields above are entered, select this to enter details of the 'based on' template to use.

Copy from Job (F14)

Once the fields above are entered, select this to enter details of the 'based on' [job](#) to use.

Complete the required details and then press Enter to display the next [Job](#) Template Maintenance window.

Job Template Maintenance List Window

To display this window, enter the required values and then press Enter on the [Job](#) Template Maintenance Selection window if more than one template fits your entered criteria.

This window will list any templates that exist for the criteria entered on the [Job](#) Template Maintenance Selection window.

Options

Select

Use this to amend a template. This is the default selection.

Copy

Use this to select a template as the basis for a copy.

Delete

Use this to delete a template. You will be asked to confirm the deletion.

Select an option or select **Exit (F3)** to leave the [task](#).

Job Template Maintenance Detail Window

To display this window, enter the required values and then press Enter on the [Job](#) Template Maintenance Selection window if only one template fits your criteria.

Alternatively, select a template on the [Job](#) Template Maintenance List window.

This window displays the template details.

Options

Add Sub-job

Use this to add a new [sub-job](#) to the template structure. This is the default selection.

Add Task

Use this to add a new [task](#) to the [sub-job](#).

Maintain Details

Use this to amend the [sub-job](#) or [task](#) on the line selected.

Delete

Use this to delete the [sub-job](#) or [task](#). You will be presented with a confirmation pop up. If you delete a [sub-job](#), the [sub-job](#) and all of its [tasks](#) will be deleted.

Parts

Use this to create a table of parts that are normally used for this kind of [task](#) on this category of [job](#).

Expenses

Use this to create a table of expected expenses that might be incurred on this category of [job](#). This is for information only.

Functions

Template Text (F14)

Use this to enter template text for the template. Any text entered here will be created as [job](#) story text when a [job](#) is created from this template.

Select an option or select **Exit (F3)** to leave the [task](#).

Add Sub-job Pop-up

To display this pop-up, select Add [Sub-job](#) against a [job](#) on the [Job](#) Template Maintenance Detail window.

Use this pop-up to create a new [sub-job](#) for the [job](#).

Fields

Sub-job

Enter the [sub-job](#) code.

You must select this field from a pre-configured list if one has been created using the Maintain Codes/Parameters [task](#). If no list exists, you can enter any character value.

Note: The code will determine the position of the [sub-job](#) in the [job](#) structure. AAA will be before BBB even if it was entered after it.

Description

Enter the description of the [sub-job](#). If the code was pre-configured, this field will default to the description from the Codes/Parameters file, but you can overwrite it.

Job Category/Description

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

The [job category](#) template determines whether the [job category](#) at lower levels can be different from the [job category](#) of the template.

If the [job category](#) can be different, this would allow other [tasks](#) such as re-[installation](#) or education to be added to a breakdown template.

The [job category](#) will determine the chargeability of this [sub-job](#) and the team assigned to do the work.

See the Maintain [Job Category](#) section for an explanation of the importance of the [job category](#) and its control fields.

Effective From Date

This field will default to the template date. However, you can enter or select a date greater than the template effective for this [sub-job](#). When a [job](#) is created, only template [sub-jobs](#) with an effective date greater than or equal to the [job](#) creation date will be included in the [job](#) structure.

Allow Actuals if Quote

Check this field if this is to be created as a [job line](#) when the template is used to create a quote. During [call](#) logging, you can request a [quotation](#) to be created and not a [job](#). However, any lines with this box **checked** will be created as [job lines](#). These [tasks](#) are usually to allow scheduling and reporting of the time required to produce the [quotation](#).

A field on the [job category](#) of the template will determine if the time to produce the [quotation](#) will be invoiced to the customer.

Estimated Labour Hours

Use this field if this [sub-job](#) is to be used for labour and enter an estimated value. The [sub-job](#) does not need to have any hours, parts or subcontract [tasks](#) attached to it; it can act only as a control.

Total Labour Hours

This field is calculated by the application and is a total of the estimated labour hours of all the [tasks](#) associated with this [sub-job](#) plus the estimated labour hours of the [sub-job](#) itself.

Chargeable

This field is for display only on this pop-up. It will be set to **1** if a single chargeable element is set to **1** in the Maintain [Cover Type/Job Category task](#). Chargeable elements are labour, travel, mileage, expenses and up to 4 categories on Inventory items. See the Maintain [Cover Type/Job Category](#) section for further explanation.

S/C Reference (Subcontract)

Use this field to enter a description that will be used as the item for the creation of a purchase order for this [sub-job](#). If you enter a description, this will make this [sub-job](#) a subcontract [sub-job](#) and estimated hours cannot be entered.

Quantity (Subcontract)

Use this field to enter a value that will be used as the quantity for the creation of a purchase order for this [sub-job](#).

Predecessor Sub-job/Task

Use this field to indicate if a particular [sub-job](#) or [task](#) is a predecessor [task](#) in the [job](#) structure and should have a target date and time less than the target date and time of the [sub-job](#) being maintained.

Elapsed Days

Use this field to force the target start date and time of the [job line](#) generated from this template line to be this number of elapsed days after the previous [job line](#). This allows delay to be introduced into the timeline of the [job](#). For instance, a 3-day delay could be introduced after subcontract [tasks](#) to compensate for any transport risks.

Model Number

Enter a valid [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Use this field to indicate that this template line is for [tasks](#) on a different piece of equipment from the equipment on the template. A [model](#) can only be entered if the [job category](#) field that allows the [model](#) to be different is **checked**.

Instruction Code

Use this field to attach an instruction code to the template line. The instruction code has attached to it a number of work instructions. This allows complex [job](#) instructions to be added to the template without increasing the number of reportable [tasks](#) to the template.

You can use the prompt facility on this field to select from the Select Instruction Code pop-up.

Select **Update (F8)** to create or update the [sub-job](#) and return to the [Job](#) Template Maintenance Detail window.

Add Task Pop-up

To display this pop-up, select Add [Task](#) against a [job](#) on the [Job](#) Template Maintenance Detail window.

Use this pop-up to create a new [task](#) for a [sub-job](#).

Fields

Task

Enter the [task](#) number.

You must select this field from a pre-configured list if one has been created using the Maintain Codes/Parameters [task](#). If no list exists, you can enter any numeric value.

Description

Enter the description of the [task](#). If the code was pre-configured, this field defaults to the description from the Codes/Parameters file, but you can overwrite it.

Job Category/Description

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

The [job category](#) template determines whether the [job category](#) at lower levels can be different from the [job category](#) of the template.

If the [job category](#) can be different, this would allow other [tasks](#) such as re-[installation](#) or education to be added to a breakdown template.

The [job category](#) will determine the chargeability of this [task](#) and the team assigned to do the work.

See the Maintain [Job Category](#) section for an explanation of the importance of the [job category](#) and its control fields.

Effective From Date

This field will default to the template date. However, you can enter or select a date greater than the template effective for this [task](#). When a [job](#) is created, only template [tasks](#) with an effective date greater than or equal to the [job](#) creation date will be included in the [job](#) structure.

Estimated Labour Hours

Use this field if this [task](#) is to be used for labour and enter an estimated value.

Chargeable

This field is for display only on this pop-up. It will be set to **1** if a single chargeable element is set to **1** in the Maintain [Cover Type/Job Category task](#). Chargeable elements are labour, travel, mileage, expenses and up to 4 categories on Inventory items. See the Maintain [Cover Type/Job Category](#) section for further explanation.

S/C Reference (Subcontract)

Use this field to enter a description that will be used as the item for the creation of a purchase order for this [task](#). If you enter a description, this will make this [task](#) a subcontract [task](#) and estimated hours cannot be entered.

Quantity (Subcontract)

Use this field to enter a value that will be used as the quantity for the creation of a purchase order for this [task](#).

Predecessor Sub-job/Task

Use this field to indicate if a particular [sub-job](#) or [task](#) is a predecessor [task](#) in the [job](#) structure and should have a target date and time less than the target date and time of the [task](#) being maintained.

Elapsed Days

Use this field to force the target start date and time of the [job line](#) generated from this template line to be this number of elapsed days after the previous [job line](#). This allows delay to be introduced into the timeline of the [job](#). For instance, a 3-day delay could be introduced after subcontract [tasks](#) to compensate for any transport risks.

Model Number

Enter a valid [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Use this field to indicate that this template line is for [tasks](#) on a different piece of equipment from the equipment on the template. A [model](#) can only be entered if the [job category](#) field that allows the [model](#) to be different is **checked**.

Instruction Code

Use this field to attach an instruction code to the [job line](#). The instruction code has attached to it a number of work instructions. This allows complex [job](#) instructions to be added to the [job](#) without increasing the number of reportable [tasks](#) to the [job](#).

You can use the prompt facility on this field to select from the Select Instruction Code pop-up.

Select **Update (F8)** to create or update the [task](#) and return to the [Job](#) Template Maintenance Detail window.

Maintain Details Pop-up

To display this pop-up, select Maintain Details against a [job](#) on the [Job](#) Template Maintenance Detail window.

Use this pop-up to maintain either a [sub-job](#) or a [task](#).

Fields

Description

You can change the description of the [sub-job](#) or [task](#). If the code was pre-configured, this field will default from the description in the Codes/Parameters file, but you can overtype it.

Job Category/Description

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

The [job category](#) template determines whether the [job category](#) at lower levels can be different from the [job category](#) of the template.

If the [job category](#) can be different, this would allow other [tasks](#) such as re-[installation](#) or education to be added to a breakdown template.

The [job category](#) will determine the chargeability of this [sub-job](#) or [task](#) and the team assigned to do the work.

See the Maintain [Job Category](#) section for an explanation of the importance of the [job category](#) and its control fields.

Effective From Date

This will default to the template date. However, you can enter or select a date greater than the template effective for this [sub-job](#) or [task](#). When a [job](#) is created, only template [tasks](#) with an effective date greater than or equal to the [job](#) creation date will be included in the [job](#) structure.

Allow Actuals if Quote

Check this field if this [sub-job](#) is to be created as a [job line](#) when the template is used to create a quote. During [call](#) logging, you can request a [quotation](#) to be created and not a [job](#). However, any lines with this box **checked** will be created as [job lines](#). These [sub-jobs](#) are usually to allow scheduling and reporting of the time required to produce the [quotation](#).

A field on the [job category](#) of the template will determine if the time to produce the [quotation](#) will be invoiced to the customer.

This field is not available for [tasks](#).

Estimated Labour Hours

Use this field if this [sub-job](#) or [task](#) is to be used for labour and enter an estimated value. The [sub-job](#) or [task](#) does not need to have any hours, parts or subcontract [tasks](#) attached to it; it can act only as a control.

Total Labour Hours

This field is calculated by the application and is a total of estimated labour hours of all the [tasks](#) associated with a [sub-job](#) plus the estimated labour hours of the [sub-job](#) itself.

Chargeable

This field is for display only on this pop-up. It will be set to **1** if a single chargeable element is set to **1** in the Maintain [Cover Type/Job Category task](#). Chargeable elements are labour, travel, mileage, expenses and up to 4 categories on Inventory items. See the Maintain [Cover Type/Job Category](#) section for further explanation.

S/C Reference (Subcontract)

Use this field to enter a description that will be used as the item for the creation of a purchase order for this [sub-job](#). If you enter a description, this will make this [sub-job](#) or [task](#) a subcontract [sub-job](#) or [task](#) and estimated hours cannot be entered.

Quantity (Subcontract)

Use this field to enter a value that will be used as the quantity for the creation of a purchase order for this [sub-job](#) or [task](#).

Predecessor Sub-job/Task

Use this field to indicate if a particular [sub-job](#) or [task](#) is a predecessor [task](#) in the [job](#) structure and should have a target date and time less than the target date and time of the [sub-job](#) or [task](#) being maintained.

Elapsed Days

Use this field to force the target start date and time of the [job line](#) generated from this template line to be this number of elapsed days after the previous [job line](#). This allows delay to be introduced into the timeline of the [job](#). For instance, a 3-day delay could be introduced after subcontract [tasks](#) to compensate for any transport risks.

Model Number

Enter a valid [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Use this field to indicate that this template line is for [tasks](#) on a different piece of equipment from the equipment on the template. A [model](#) can only be entered if the [job category](#) field that allows the [model](#) to be different is **checked**.

Instruction Code

Use this field to attach an instruction code to the template line. The instruction code has attached to it a number of work instructions. This allows complex [job](#) instructions to be added to the template without increasing the number of reportable [tasks](#) to the template.

You can use the prompt facility on this field to select from the Select Instruction Code pop-up.

Note: Only certain fields can be amended. If a change is required to a protected field, the [sub-job](#) or [task](#) must be deleted and re-added.

Select **Update (F8)** to update the [sub-job](#) or [task](#) and return to the [Job](#) Template Maintenance Detail window.

Delete Details Pop-up

To display this window, select Delete against a [job](#) on the [Job](#) Template Maintenance Detail window.

Use this window to delete a [sub-job](#) or [task](#).

Functions

Confirm Delete (F11)

Use this to confirm the deletion of a [job line](#).

If this is a [sub-job](#), you will delete the [sub-job](#) and all of its [tasks](#). If this is a [task](#), you will delete the [task](#) only.

Select **Confirm Delete (F11)** to delete the [sub-job](#) or [task](#) and return to the [Job](#) Template Maintenance Details window.

Parts Window

To display this window, select Parts against a [job](#) on the [Job](#) Template Maintenance Detail window.

Use this window to record parts required on a template line.

Fields

Select (S)

Enter one of the following:

1 - To select this line for amendment

(This is not available once an order has been placed.)

The values will be moved down into the input capable line to allow amendment.

4 - To delete the parts requirement line

You will be asked to confirm the deletion.

5 - To display the All Stockrooms for an Item Enquiry window.

6 - To display the Inventory Item/Stockroom Enquiry window, using the stockroom on the line

Part Number

This field displays a valid Inventory item number.

Description

This field displays the Inventory description.

Quantity

This field displays the quantity required.

UOM

This field displays the unit of measure that will be used when an order is placed.

Input Fields

Item Number

Enter a valid Inventory item number.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Quantity

Enter the required quantity for the item. This must be a positive value.

Unit of Measure

Enter a valid unit of measure for the item.

Alternatively, use the prompt facility to select from the Purchase/Issue Unit Selection pop-up.

Functions

Authorised Parts (F15)

Use this to list all parts that can be ordered for the [model](#) number on the [job line](#).

Note: *If one item is set up in the authorised [parts list](#), only this part can be entered. If no parts are set up on the list, all items can be ordered.*

Enter the required option and then press Enter.

Add Expenses Window

To display this window, select Expenses against a [job](#) on the [Job](#) Template Maintenance Detail window.

Use this window to add expenses to the template.

Fields

Expense

Enter the expense code that can be used on any [job](#) created from this template.

Alternatively, use the prompt facility to select from the Expense Selection pop-up.

This is an information field only in this version of the application.

Press Enter to add the [expense type](#).

Copy from Template Window

To display this window, enter details of the template to be created and then select **Copy from Template (F10)** on the [Job](#) Template Maintenance Selection window.

Use this window to specify the template details that are to be used as a basis of the new template. The base template must exist.

[Job](#) categories have various control fields that would make it inappropriate to copy the details from template to another. Error messages will inform you of the incompatibilities.

Fields

All descriptions below apply to both sets of template fields except the template description, which is mandatory on the new template.

Template Type

Enter a valid template type.

Alternatively, use the prompt facility to select from the Template Type pop-up.

The description code allows users to store different types of templates. The suggestion is that any that are sent out from a central [location](#) may be classed as global codes and ones maintained/changed locally may be classed as local templates.

The template type is one of the classifications that allow the user to select which template is to be attached to the [job](#).

Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

It is likely that the template required may be totally different on a planned maintenance [job](#) for a machine from one, for example, on a breakdown; therefore the [job category](#) is mandatory.

Division Code

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

This is the first of the fields that categorise the template for the [job category](#) to the [division](#) to which the [models](#) belong.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

This is the second of the fields that categorise the template for the [job category](#) to the [division](#) and [model](#) group to which the [models](#) belong. If a [model](#) group is entered, a valid [division](#) must also be entered.

Model Sub Group

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

This is the third of the fields that categorise the template for the [job category](#) to the [division](#), [model](#) group and [model](#) sub-group to which the [models](#) belong. If a [model](#) sub-group is entered, a [division](#) and [model](#) group must also be entered.

Model Number

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

As the [model](#) file holds the [division](#), [model](#) group and [model](#) sub-group, if [model](#) is entered, the [division](#) etc. do not need to be.

Procedure

Enter a valid procedure.

Alternatively, use the prompt facility to select from the Procedure pop-up.

This is used to sub-divide further the type of template.

An example could be a car where there are various planned maintenance [jobs](#) with different parts etc. required for each one.

The templates may be set up as PSV (Planned Service [Visits](#)) for a specific [model](#) e.g. Fiat Multipla.

However, the procedures may be as follows:

12M

24M

36M

Each of these describes the different service requirements after 12 months, 24 months and 36 months of driving.

Effective Date

Enter or select a valid date on which the template becomes effective.

Template Description

Enter a template description, e.g. 12-month Service.

Press Enter to validate the data and then select **Confirm (F8)** to perform the copy.

Copy from Job Window

To display this window, enter details of the template to be created and then select **Copy from Job (F14)** on the [Job](#) Template Maintenance Selection window.

Use this window to specify the [job](#) on which to base the template creation.

Fields

Template Type

Enter a valid template type.

Alternatively, use the prompt facility to select from the Template Type pop-up.

This code allows you to store different types of templates. The suggestion is that any that are sent out from a central [location](#) may be classed as global codes and ones maintained/changed locally may be classed as local templates.

The template type is one of the classifications that allow you to select which template is to be attached to the [job](#).

Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

It is likely that the template required may be totally different on a planned maintenance [job](#) for a machine from one on, for example, a breakdown, therefore the [job category](#) is mandatory.

Division Code

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

This is the first of the fields that categorise the template for the [job category](#) to the [division](#) to which the [models](#) belong.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

This is the second of the fields that categorise the template for the [job category](#) to the [division](#) and [model](#) group to which the [models](#) belong. If a [model](#) group is entered, a valid [division](#) must also be entered.

Model Sub Group

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

This is the third of the fields that categorise the template for the [job category](#) to the [division](#), [model](#) group and [model](#) sub-group to which the [models](#) belong. If a [model](#) sub-group is entered, a [division](#) and [model](#) group must also be entered.

Model Number

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

As the [Model](#) file holds the [division](#), [model](#) group and [model](#) sub-group, if the [model](#) is entered, the [division](#) etc. do not need to be.

Procedure

Enter a valid procedure.

Alternatively, use the prompt facility to select from the Procedure pop-up.

This is used to sub-divide further the type of template.

An example could be a car where there are various planned maintenance [jobs](#) with different parts etc. required for each one.

The templates may be set up as PSV (Planned Service [Visits](#)) for a specific [model](#) e.g. Fiat Multipla.

However, the procedures may be as follows:

12M

24M

36M

Each of these describes the different service requirements after 12 months, 24 months and 36 months of driving.

Effective Date

Enter or select a valid date on which the template becomes effective.

Template Description

Enter a template description, e.g. 12-month Service.

Job Number

Enter a valid [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

The [job](#) number must be fully closed before it can be used to create a template.

Press Enter to validate the data and then select **Confirm (F8)** to perform the copy.

Maintain Defect Code [7/EQM]

Use this [task](#) to define defect and repair relationships. These apply to the parts the technician fits to equipment during a repair. You can enter them when you perform the parts booking [task](#).

Note: You set up the codes using the Maintain Codes/Parameters [task](#). Set up defect codes under type DEFC and repair codes under type REPC.

Note: You can enter more than one repair code for each defect.

Defect Code Maintenance Selection Window

To display this window, select the Maintain Defect Code [task](#).

Use this window to select the defect code for which you want to enter the associated repair codes.

Fields

Defect Code

Enter a valid defect code.

Alternatively, use the prompt facility to select from the Defect Code pop-up.

Select a defect code or enter a defect code and then press Enter to display the Defect Code Maintenance window.

Defect Code Maintenance Window

To display this window, select a defect code or enter a defect code and then press Enter on the Defect Code Maintenance Selection window.

Use this window to maintain the defect and repair code relationships.

Fields

Repair Code

Enter the repair code to associate with this defect code.

Alternatively, use the prompt facility to select from the Repair Code pop-up.

Default

Use this checkbox as follows:

Unchecked - If this is not the default repair code for this defect

Checked - To specify that this is the default repair code for this defect

Note: *You can only have one repair code with the default checked. Therefore, if you want to change the default, you must set the old default to unchecked before you can set the new default to checked.*

Add/Replace

Use this checkbox as follows:

Unchecked - If you do not need to add or replace a part for this repair

The part is not flagged for payment on a Warranty Claim, and therefore does not appear on a credit note.

Checked - If you have either to add or replace a part for this repair

Options

Select

Use this to change the repair code relationship. This is the default selection.

The details are displayed in the fields at the top of the window.

Delete

Use this to delete the repair code relationship.

Note: *To save the new repair code relationship, press Enter. This is then displayed in the bottom half of the window.*

Select **Update (F8)** to save all the changes and return to the Defect Code Maintenance Selection window.

Maintain FSG/Territory/Team [8/EQM]

Use this [task](#) to set up and maintain the relationship between [field service groups](#), geocodes, territories, teams, technicians and alternative technicians.

The relationships you define here are used by Equipment Servicing for selecting a team or technician when scheduling work within [call](#) logging.

If your territories are small, you can set up a team with several technicians for each territory. The software will schedule the member of the team with the lightest workload. This is no problem where the distances to be travelled are not significant.

However, if your territories tend to be large (more than 50 miles across), this set-up is unlikely to suit you. The software could select the technician within the team who is located the furthest from the [job](#).

You can avoid this problem by setting up a single technician for a territory, and then specifying that technician as the prime technician for the territory. You would then specify a first, second, and perhaps a third alternative technician to cover if the prime technician is unavailable. These alternatives would be the technicians that are geographically the closest to the prime technician's territory.

You can define any geocode to more than one territory. This is useful if you have service areas that overlap for different products.

You must set up your [field service groups](#) using the Maintain [Field Service Group task](#) before using this [task](#).

FSG/Territory/Team Maintenance Selection Window

To display this window, select the Maintain FSG/Territory/Team [task](#).

Fields

Branch

Enter the [branch](#) in which you want to set up your definition or leave this field blank to create a definition for all [branches](#).

This field defaults to your current [branch](#).

Territory Profile Code

Enter a territory profile code.

Alternatively, use the prompt facility to select from the TRPC Territory Profile Code pop-up.

The territory profile is a means of linking teams and technicians to a shift profile.

Use this if you want the software to schedule [jobs](#) to a different set of technicians and teams depending on the shift into which each [job](#) falls. Enter the territory profile in this field, and enter it also against the relevant shift in the Maintain Shift Profile [task](#).

Leave this field blank if you are not using the shift profiles function, or if you are using it but you do not want to schedule different teams and technicians depending on the shift of a [job](#). In this case, Equipment Servicing will use the shift definition to calculate the target response time, but will not schedule [jobs](#) unless they fall into the core shift hours.

Press Enter to display the FSG/Territory/Team Maintenance List window.

FSG/Territory/Team Maintenance List Window

To display this window, press Enter on the FSG/Territory/Team Maintenance Selection window.

When you first display this window, it has no data on it, and you must select **Add or Copy Based On (F10)** and display the FSG/Territory/Team Maintenance Copy window to add definitions.

Once you have set up definitions, this window lists all the [field service groups](#) that you have set up for the specified [branch](#) and territory profile.

Options

Select

Use this to select a [field service group](#) for maintenance.

Functions

Add or Copy Based On (F10)

Use this to display the FSG/Territory/Team Maintenance Copy window, where you can add definitions.

Select Add or **Copy Based On (F10)** to display the FSG/Territory/Team Maintenance Copy window.

Alternatively, select a line to display the FSG/Territory/Team Maintenance Details window.

FSG/Territory/Team Maintenance Copy Window

To display this window, select Add or **Copy Based On (F10)** on the FSG/Territory/Team Maintenance List window.

You can use this window in two ways:

- 1 You can simply specify the branch, field service group and optionally the job category and territory profile for which you want to define teams or technicians. You use only the first four input fields on the window.
- 2 You can do the above, and also use the lower fields on the window to specify the branch, field service group, job category and territory profile from which you want to copy. This will take all the teams and technicians specified there and add them to this definition. You can then make changes.

Fields

Branch

Enter the [branch](#) to which this definition is to apply.

Field Service Group

Enter the [field service group](#) to which this definition is to apply.

Alternatively, use the prompt facility to select from the Field Service Selection pop-up.

Job Category

If you want this definition to apply only to a particular [job category](#), you can optionally enter that category here.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Territory Profile Code

If you want to attach this definition to a particular territory profile, enter it here.

Alternatively, use the prompt facility to select from the TRPC Territory Profile Code pop-up.

This is only useful if you want to be able to link the profile to a shift profile. If you do not need to do this, leave this field blank.

Copy Based On

Branch

If you want to copy an existing definition, enter the relevant [branch](#) here.

Field Service Group

If you want to copy an existing definition, enter the relevant [field service group](#) here.

Alternatively, use the prompt facility to select from the Field Service Selection pop-up.

Job Category

If you want to copy an existing definition, enter the relevant [job category](#) here.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Territory Profile Code

If you want to copy an existing definition, enter the relevant territory profile code here.

Alternatively, use the prompt facility to select from the TRPC Territory Profile Code pop-up.

Functions

Copy Based On (F10)

Use this to perform the copy. The definitions from your copy fields will be copied to the new definition, and will be displayed on the FSG/Territory/Team Maintenance Details window.

If you completed any of the copy fields, select **Copy Based On (F10)** to perform the copy. All the data in the based on definition will be copied, and you will see it on the FSG/Territory/Team Maintenance Details window.

If you only entered the top four fields, press Enter. You will see the FSG/Territory/Team Maintenance Details window, where your choices will be listed at the top of the window.

FSG/Territory/Team Maintenance Details Window

You can reach this window in the following ways:

- Press Enter on the FSG/Territory/Team Maintenance Copy window.
- Select **Copy Based On (F10)** on the FSG/Territory/Team Maintenance Copy window.
- Select a [field service group](#) and then press Enter on the FSG/Territory/Team Maintenance List window.

This is the main maintenance window for your [field service group](#)/territory/team definitions.

The [branch](#), [field service group](#), and, where relevant, the [job category](#) and territory profile are displayed at the top of the window.

Any existing definitions are listed beneath the column headings.

You can enter new definitions in two ways:

- 1 You can enter them in the input fields at the bottom of this window.
- 2 You can copy existing definitions using the FSG/Territory/Team Maintenance Copy window.

Fields

Position by Territory/Geocode 1

The list of definitions may be extensive, so if you want to re-position the display to another part of the list, enter the relevant territory and optionally the geocode and then press Enter.

Tty

This field in the table displays the territory within which the defined geocodes, teams and technicians operate.

The input field is where you enter or amend the territory to which the definition applies. You can only enter existing territories.

You can use the prompt facility on this field to select from the Territory Selection pop-up.

Note: *Although it is mandatory, this field is a memorandum field. It is not used elsewhere in the system. It is intended as a useful reference.*

If you need to set up new territories, select the Maintain Codes/Parameters [task](#) and set up new territories as IDs under type PTCH.

If you cannot find the parameter type PTCH, set it up as a new parameter type in the Maintain Codes/Parameters [task](#). The parameter IDs should be three characters long. See the Maintain Codes/Parameters section of the [Company](#) Parameters Maintenance chapter of this product guide for further information.

Geocode Geo 1

This field in the table displays the first part of the geocode. This may correspond to the first part of a postcode, for example.

The input field is where you enter the first part of the geocode to which the definition applies. You can enter the same geocode in more than one territory.

You cannot use the input field to amend geocodes. To change a geocode you must delete the line and then re-enter it.

Geocode Geo 2

This field in the table displays the second part of the geocode. This may correspond to the second part of a postcode, for example.

The input field is where you enter the second part of the geocode to which the definition applies. You can enter the same geocode in more than one territory.

You cannot use the input field to amend geocodes. To change a geocode you must delete the line and then re-enter it.

Prime Tech

This field in the table displays the prime technician. This is the technician that the software will select to service any machine that is part of the specified [field service group](#) and also covers the specified geocode.

The input field is where you enter or amend the prime technician.

If you enter a prime technician, you cannot enter a prime team.

You can use the prompt facility on this field to select from the Technician Selection pop-up.

Prime Team

This field in the table displays the prime team. This is the team that the software will select to service any machine that is part of the specified [field service group](#) and also covers the specified territory and geocode.

The input field is where you enter or amend the prime team.

If you enter a prime team, you cannot enter a prime technician.

You can use the prompt facility on this field to select from the Team Description pop-up.

First Tech

This field in the table displays the first alternative technician. This is the technician that the software will select if the prime technician or team is not available.

The input field is where you enter or amend the first alternative technician.

If you enter a first alternative technician, you cannot enter a first alternative team.

You can use the prompt facility on this field to select from the Technician Selection pop-up.

First Team

This field in the table displays the first alternative team. This is the team that the software will select if the prime technician or team is not available.

The input field is where you enter or amend the first alternative team.

If you enter a first alternative team, you cannot enter a first alternative technician.

You can use the prompt facility on this field to select from the Team Description pop-up.

Second Tech

This field in the table displays the second alternative technician. This is the technician that the software will select if the prime and first technicians or teams are not available.

The input field is where you enter or amend the second alternative technician.

If you enter a second alternative technician, you cannot enter a second alternative team.

You can use the prompt facility on this field to select from the Technician Selection pop-up.

Second Team

This field in the table displays the second alternative team. This is the team that the software will select if the prime and first technicians or teams are not available.

The input field is where you enter or amend the second alternative team.

If you enter a second alternative team, you cannot enter a second alternative technician.

You can use the prompt facility on this field to select from the Team Description pop-up.

Third Tech

This field in the table displays the third alternative technician. This is the technician that the software will select if the prime, first and second technicians or teams are not available.

The input field is where you enter or amend the third alternative technician.

If you enter a third alternative technician, you cannot enter a third alternative team.

You can use the prompt facility on this field to select from the Technician Selection pop-up.

Note: You could specify a catchall here, perhaps a supervisor, who would then be assigned any [job](#) that the software could not assign to a specified technician or team.

Third Team

This field displays the third alternative team. This is the team that the software will select if the prime, first and second technicians or teams are not available.

The input field is where you enter or amend the third alternative team.

If you enter a third alternative team, you cannot enter a third alternative technician.

You can use the prompt facility on this field to select from the Team Description pop-up.

Note: You could specify a catchall here, perhaps a supervisory team, who would then be assigned any [job](#) that the software could not assign to a specified technician or team.

Options

Select

Use this to place the details from an existing line into the input fields at the bottom of the window, ready to be maintained.

Note: *You cannot change geocodes in this way. If you do need to change a geocode, you must delete the line and re-enter it with the correct geocode.*

If you have entered a new definition or amended an existing one in the input fields at the bottom of the window, press Enter. Your definition will be added to the list displayed.

Select **Update (F8)** to update the data and return to the FSG/Territory/Team Maintenance List window.

Maintain Field Service Group [9/EQM]

A [field service group](#) groups together those [divisions](#), groups, sub-groups and [models](#) that will need similar skills when being serviced. You set them up with this [task](#).

You will then use the Maintain FSG/Territory/Team [task](#) to define certain technicians or teams to service the [field service group](#). The software uses these technician team and territory definitions to assign a technician from a team to a service [job](#) automatically.

The customer's geocode establishes the territory (or territories, as you can define a geocode to more than one territory) in which the [installation](#) falls, and the software then selects the prime technician or team covering this territory and [field service group](#).

Field Service Group Maintenance Initial Window

To display this window, select the Maintain [Field Service Group task](#).

Fields

Field Service Group

Enter a new or existing [field service group](#).

Alternatively, use the prompt facility to select from the Field Service Selection pop-up.

Press Enter to display the [Field Service Group](#) Maintenance Detail window.

Field Service Group Maintenance Detail Window

To display this window, press Enter on the [Field Service Group](#) Maintenance Initial window.

Fields

Field Service Group Description (Untitled)

Enter the [field service group](#) description, using up to 36 alphanumeric characters.

Model

Enter specific [models](#) to which the skills of the [field service group](#) are restricted.

You do not need to enter a [model](#) if the [field service group](#) is competent to service all the [models](#) in the [model](#) sub-group.

If you enter a [model](#), you must enter a [division](#), but you do not need to enter the [model](#) group or [model](#) sub-group.

You can use the prompt facility on this field to select from the [Model](#) Master Scan pop-up.

Division

Enter the product [division](#)(s) covered by the [field service group](#). This means that the [field service group](#) is competent to service all products within the [division](#), if no further qualification is entered (that is, for [model](#) group, [model](#) sub-group or [model](#)).

You can use the prompt facility on this field to select from the [Division](#) Selection pop-up.

Model Group

Enter the specific [model](#) group or groups, within a [division](#), that are covered by the [field service group](#). Leave this field blank if all [model](#) groups in the [division](#) are covered.

This means that the [field service group](#) is competent to service all products within the [model](#) group if you do not enter any further qualification (that is, for [model](#) sub-group or [model](#)).

You can use the prompt facility on this field to select from the [Model](#) Group pop-up.

Model Sub-Group

Enter the specific [model](#) sub-group or sub-groups within a [model](#) group that are covered by the [field service group](#). Leave this field blank if all [model](#) sub-groups in the [model](#) group are covered.

This means that the [field service group](#) is competent to service all products within the [model](#) sub-group if you do not enter any further qualification at [model](#) level.

You can use the prompt facility on this field to select from the [Model](#) Subgroup Selection pop-up.

Functions

Fold/Truncate (F13)

Use this to toggle between displaying more and less detail for each line.

Select **Update (F8)** to update the data.

Maintain 3-D Matrix [10/EQM]

Use this [task](#) to define the 3-D matrix. Equipment Servicing uses the 3-D matrix to reduce the response time retrieved from the [contract](#) header, line, or type, by a percentage.

The percentage depends on:

- The importance of the customer placing the [call](#)
- The volume segment set at [model](#) level
- The seriousness of the problem, for example: is the machine up and working, but in need of attention, or is it down and completely out of action

Description

When you select this [task](#), you display a list of the volume segments with a percentage reduction in response time by customer importance, and whether the machine is up (working, but in need of attention), or down (out of action).

3-D Matrix Maintenance Window

To display this window, select the Maintain 3-D Matrix [task](#).

Use this window to enter the percentage change on specified priority machines, for all volume segment codes.

Note: *Equipment Servicing sets the target time by applying the percentage reduction for the volume segment (by [model](#)) and the customer priority (by [site's](#) additional service details) to the response hours, according to the value in the Machine Up field on the [Job](#) Details window in the [Call](#) Logging [task](#).*

Fields

Machine Up: Priorities 1-4

Enter the percentage reduction to make to the response time for this volume segment. You must enter a whole number between 0 and 100.

Machine Down: Priorities 1-4

Enter the percentage reduction to make to the response time for this volume segment. You must enter a whole number between 0 and 100.

Calculating the Response Time

The Response Time hierarchy looks for the response hours in the following order:

- 1 Special Serial Numbers file (but does not apply the 3-D matrix reduction to this figure)
- 2 Contract line
- 3 Contract header
- 4 Contract type (incl *NO)

5 Default branch response time (set in the Escalation Control file)

Equipment Servicing uses the first response time that it finds and applies the 3-D matrix reduction to them all (except 1) to establish the [call](#) response.

[Call](#) target time = ([Call](#) received date and time + [Call](#) response)

Select **Update (F8)** to save any changes.

Maintain Special Serial Numbers [11/EQM]

Use this [task](#) to set up an actual response time, in hours and minutes, for a specified item of equipment. Equipment Servicing normally uses this as an exception, to provide a short-[term](#), special service to an item of equipment.

Note: *The response time you enter here is at the top of the response times hierarchy, and so overrides any [model](#), [contract](#) or other response times set up elsewhere.*

Special Serial Numbers Selection Window

To display this window, select the Maintain Special [Serial Numbers task](#).

Use this window to select the [serial number](#) and [model](#) for which you want to enter a specific response time.

Fields

Serial Number

Enter the [serial number](#) to maintain.

Model

Enter the [model](#) to maintain.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: *Leave the [Serial Number](#) field blank to display the Equipment by [Model](#) window, showing all the [serial numbers](#) for the [model](#). Select the [serial number](#) you require.*

Functions

List of Serial Numbers (F6)

Use this to display a list of the [serial numbers](#) for which you have entered a response time.

Enter or select a [serial number](#) and [model](#) and then press Enter to display the Special [Serial Numbers](#) Maintenance window.

Special Serial Numbers Maintenance Window

To display this window, enter or select a [serial number](#) and [model](#) combination and then press Enter on the Special [Serial Numbers](#) Selection window.

Alternatively, select a machine on the Equipment by [Model](#) window.

Use this window to enter the response time for the selected [serial number](#) and [model](#).

Fields

Response Time

Enter the response time, in hhh:mm format, to apply to the [model](#) and [serial number](#).

This response time takes priority when calculating the target time for a [call](#) to this machine.

The Response Time hierarchy looks for the response hours in:

- 1 Special Serial Number file
- 2 Contract line
- 3 Contract header
- 4 Contract type (incl *NO)
- 5 Default branch response time (set on the Escalation Control file)

Equipment Servicing goes through each in turn and uses the first that it finds. It applies the 3-D matrix reduction to all but the special [serial number](#) response time, to establish the [call](#) response.

Select **Update (F8)** to save any changes.

Maintain Instructions [12/EQM]

Use this [task](#) to set up or maintain instruction codes.

PM Device Task List Maintenance Window

To display this window, select the Maintain Instructions [task](#).

Fields

Instruction Code

Enter an instruction code.

Alternatively, use the prompt facility to select from the Select Instruction Code pop-up.

Select an instruction code or enter an instruction code and then press Enter to display the PM Device Instruction List Maintenance window.

PM Device Instruction List Maintenance Window

To display this window, select an instruction code or enter an instruction code and then press Enter on the PM Device Instructions List Maintenance Selection window.

Fields

Instruction Code

This field displays the selected instruction code.

Instruction Description

Enter a short description of the instruction. Up to 30 characters can be used.

Instruction Sequence

You can optionally enter a sequence number.

Instruction Help Text

You can optionally enter help text for this instruction. Eight lines of 32 characters are available.

Functions

Delete (F11)

Use this to delete the Instruction. Confirmation is required.

Select **Update (F8)** to save any additions or changes made and return to the Pm Device Instruction List Maintenance Selection window. If you leave this window without selecting **Update (F8)** any changes you have made will be lost.

Maintain Equipment Instructions [13/EQM]

Use this [task](#) to set up or maintain equipment instructions.

PM Equipment Instruction List Reference Maintenance Selection Window

To display this window, select the Maintain Equipment Instructions [task](#).

Fields

Job Category

Enter a [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Model Sub-Group

Enter a [model](#) sub-group.

Model Number

Enter a [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Enter a [job category](#) and [model](#) sub-group code and then press Enter to display the PM Equipment Instruction List Reference Maintenance Details window.

PM Equipment Instruction List Reference Maintenance Details Window

To display this window, enter a [job category](#) and [model](#) sub-group code and then press Enter on the PM Equipment Instruction List Reference Maintenance Selection window.

Fields

Job Category

This field displays the selected [job category](#).

Model Sub-Group

This field displays the selected [model](#) sub-group.

Model Number

This field displays the selected [model](#) number.

Instruction Codes

Enter the instruction codes you wish to associate with the selected combination.

Functions

Delete (F11)

Use this to delete the instructions. Confirmation is required.

Select **Update (F8)** to save any additions or changes made and return to the PM Equipment Instructions List Reference maintenance Selection window. If you leave this window without selecting **Update (F8)**, and changes you have made will be lost.

Technician Messages [40/EQM]

Use this [task](#) to enter, store and retrieve messages, for technicians and teams.

You can send messages to any technician or team in any [branch](#).

Description

You can enter a three-line (195-character) message and the sender's code (for example, technician number). Equipment Servicing calculates the message expiry date and adds the current date to the default expiry days for messages, set up in the [company](#) profile.

Technician work allocation also displays technician and team messages before displaying the [job](#) list for the selected technician or team.

Note: You can only review [branch](#) messages using this [task](#).

Implications

You must define the message sender to Equipment Servicing as a technician.

If you do not require a sender, you can use the same technician or team as both the sender and the recipient.

Technician Message Maintenance Window

To display this window, select the Technician Messages [task](#).

Use this window to select the message type you want to maintain or enter.

Fields

Message Type to Maintain

Select one of the following:

Technician (1) - To maintain a technician message

Team (2) - To maintain a team message

All (3) - To maintain all types of messages

Technician

Enter the technician to whom you wish to send the message.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Team

Enter the team to which you wish to send the message.

Alternatively, use the prompt facility to select from the Team Description pop-up.

Functions

Message Entry (F10)

Use this to enter a technician message on the Send a Technician Message window.

Complete the required fields and then press Enter to display the Technician Message Maintenance Selection window.

Send an Technician Message Window

To display this window, select **Message Entry (F10)** on the Technician Message Maintenance window.

Use this window to define a new technician message.

Fields

Message From

Enter the technician who originated the message.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Expiry Date

Enter or select the expiry date. This defaults to the current system date plus the default expiry days for messages (defined in the [company](#) profile).

Message

Enter the message, using up to three lines of 65 characters.

Send To

Technician

Enter the technician to whom to send the message.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Team

Enter the team to which to send the message.

Alternatively, use the prompt facility to select from the Team Description pop-up.

All Technicians

Use this checkbox as follows:

Unchecked - If the value entered in the Technician or Team field will be used

Checked - To transmit the message to all technicians defined to the [branch](#)

Select **Send Message (F8)** to send the message.

Technician Message Maintenance Selection Window

To display this window, enter the selection criteria and then press Enter on the Technician Message Maintenance window.

This window displays all the technician messages that match the entered criteria.

Options

Select

Use this to display the Amend Message pop-up so that you can maintain the selected message.

Functions**Message Entry (F10)**

Use this to display the Send a Technician Message window in order to define a new message.

Select **Exit (F3)** to leave the [task](#).

Amend Message Pop-up

To display this pop-up, select a message on either the Technician Message Maintenance Selection window or the Machine Message Maintenance Selection window.

This pop-up displays the sender, the message ID and the date and time at which the message was sent.

Fields**Expiry Date**

Enter or select the new expiry date for the message.

Message

Enter or amend the message text, using up to three lines, or 195 characters.

Select **Update (F8)** to update the message or select **Previous (F12)** to return to the previous window.

Machine Messages [41/EQM]

Use this [task](#) to store messages for machines. You can enter messages for individual machines, or on a generic basis. You can retrieve the messages when you log or despatch a [job](#).

Description

You can specify a message type. This determines whether you record the message for a specified [model](#) and [serial number](#), [serial number](#) range, [model](#) type, or [model](#) sub-group.

Leave the [model](#) and serial fields blank to retrieve outstanding messages.

If you enter a [model](#) or [serial number](#), you can define a three-line (195-character) message, and enter the sender's code (for example, technician number). Workshop Management assumes a message expiry date of 99/99/99, but you can amend this as required.

Machine Message Maintenance Window

To display this window, select the Machine Messages [task](#).

Use this window to select the message type you want to maintain.

Fields

Message Type to Maintain

Select one of the following:

[Model/Serial](#) (1) - To enter a message for a [model](#) with [serial number](#)

[Model/Serial number](#) range (2) - To enter a message for a [model](#) within a [serial number](#) range

[Model](#) (3) - To enter a message for a [model](#)

[Model](#) Sub-group (4) - To enter a message for a [model](#) sub-group

Model

Enter a [model](#) code of up to 15 characters.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial/To

Enter the [serial number](#) for the [model](#).

Alternatively, use the prompt facility to select from the Equipment by [Model](#) window, which displays a table of [serial numbers](#) for the specified [model](#).

The combination of [model](#) and [serial number](#) must exist on the [Installation](#) file.

If you are entering a message for a [serial number](#) range, enter the start and end of the range. This is inclusive.

Division

If the machine message is for a product [division](#), enter a [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

If you use this field, you must leave the [Model](#) and Serial fields blank.

Model Group

If the machine message is for a product [division](#) and [model](#) group, enter a [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

If you use this field, you must leave the [Model](#) and Serial fields blank and enter a [division](#).

Sub-group

If the machine message is for a product [division](#), [model](#) group and [model](#) sub-group, enter a [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

If you use this field, you must leave the [Model](#) and Serial fields blank and enter a [division](#) and [model](#) group.

Functions

Message Entry (F10)

Use this to enter a new message on the Send a Machine Message window.

Enter the selection criteria and then press Enter to display the Machine Message Maintenance Selection window.

Send a Machine Message Window

To display this window, select **Message Entry (F10)** on any window in this [task](#) on which it is available.

Use this window to enter a new machine message.

Fields

Message From

Enter up to 10 characters to identify the sender by name, [job](#) title or user-defined code.

Expiry Date

Enter or select the expiry date for the message (in format DDMMYY).

The default (99/99/99) means that a machine message does not expire, and is not subject to the default number of days for message expiry set in the [company](#) profile.

Message

Enter the message, using a maximum of 3 lines of 65 characters.

Send To

Model

Enter the [model](#) to which to send the message. This field defaults from the [model](#) entered on the Machine Message Maintenance window.

You can use the prompt facility on this field to select from the [Model](#) Master Scan pop-up.

Serial

Enter the [serial number](#) for the [model](#).

Alternatively, use the prompt facility to select from the Equipment by [Model](#) window, which displays a table of [serial numbers](#) for the specified [model](#).

The combination of [model](#) and [serial number](#) must exist on the [Installation](#) file.

If you are entering a message for a [serial number](#) range, enter the start and end of the range. This is inclusive.

This defaults from the Machine Message Maintenance window.

Note: If the message is for a machine with no [serial number](#), enter the [model](#) and then select **Send Message (F8)**.

Division

If the machine message is for a product [division](#), enter the [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

If you use this field, you must leave the [Model](#) and Serial fields blank.

Model Group

If the machine message is for a product [division](#) and [model](#) group, enter the [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

If you use this field, you must leave the [Model](#) and Serial fields blank and enter a [division](#).

Sub-group

If the machine message is for a product [division](#), [model](#) group and [model](#) sub-group, enter a [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

If you use this field, you must leave the [Model](#) and Serial fields blank and enter a [division](#) and [model](#).

Select **Send Message (F8)** to send the message.

Machine Message Maintenance Selection Window

To display this window, enter the selection criteria and then press Enter on the Machine Message Maintenance window.

Use this window to select the machine message you want to maintain.

Options

Select

Use this to display the Amend Message pop-up.

Select a message to display the Amend Message pop-up.

Chapter 7 Invoicing

Price Contracts [1/EQI]

Use this [task](#) to find [contracts](#) due for invoicing. The [contracts](#) can be payable in advance or in arrears, and must include [contract invoice terms](#). The batch [job](#) prices the [contracts](#) and generates [pending invoice lines](#).

You can select [contracts](#) for a specific [branch](#) or for the [company](#).

Use this [task](#) every time a batch of [contracts](#) needs scheduling for invoicing.

Note: You must have exclusive use of the [company](#) before running this [task](#).

Implications

If you do not run the Price [Contracts task](#), Equipment Servicing will not produce any invoices for [contracts](#) payable in advance or arrears.

Any fixed price [visits](#) are not charged using this [task](#); you must process the [jobs](#) through to invoice via the standard route for them to be invoiced via the Generate and Print [Job Invoices task](#).

You group invoice pending lines into invoice documents using the Generate and Print [Contract Invoices task](#).

Price Contracts Window

To display this window, select the Price [Contracts task](#).

Use this window to specify the [branch](#) and type of billing for which you want to price [contracts](#).

Fields

Select Branch to Process

Enter the [branch](#) for which you want to price [contracts](#). This defaults to your current [branch](#).

To process all [branches](#), leave this field blank.

Type of Billing Required

Select one of the following:

Standard (1) - To price all service, rental and advance copy charges

Interim (2) - To price all meter-based copy charges, based on estimated or actual values, which have reached the due date for interim billing

Reconciliation (3) - To price all meter-based copy charges, based on actual readings, which have reached the due date for reconciliation of metered copies

Price Contracts with Terms Starting On or Before

To display this field, press Enter.

Enter or select a date in DDMMYY format.

This is the [contract invoice terms](#), not [contract](#) start dates, nor [contract](#) duration. Equipment Servicing only processes [contracts](#) with pricing [terms](#) due on or before the date entered.

Note: *This pricing run includes all machines on a [contract](#) which you have never invoiced before, if the inclusion date for the machine is equal to or before the entered date.*

Select **Submit Job (F8)** to run the batch [job](#).

Complete Jobs [2/EQI]

Use this [task](#) to find [job lines](#) for your [branch](#) due for invoicing and generate [pending invoice lines](#).

Use this [task](#) every time you want to schedule a batch of [jobs](#) for invoicing.

This [task](#) takes all transactions for [jobs](#) that are at status 50 and generates invoice lines for them if the [job category](#) states that the [job](#) does not require formal [job](#) completion. If the [job category](#) requires formal manual [job](#) completion, the transactions will remain outstanding.

If the [job](#) is not at status 50, the transactions will remain outstanding (unless the manual [Job Completion task](#) is run and the [job](#) is forced to be closed).

The transactions do not need to be priced, as they already hold the [cost](#) and selling price.

Once the [task](#) is run, users are able to run pending invoice maintenance for the [jobs](#), which will enable them to manipulate the charges on each of the transactions.

Implications

If you do not run this [task](#), you will not produce invoices for [jobs](#) or [contracts](#) payable per [visit](#) unless you run the manual [Job Completion task](#) for the [job](#).

Use the **Generate and Print Job Invoices task [4/EQI]** to group pending lines into invoice documents.

Select **Confirm Submit (F8)** to submit a batch [job](#) to perform the processing.

Generate and Print Contract Invoices [3/EQI]

Use this [task](#) to find the available [contract pending invoice lines](#) for your [branch](#). This produces the invoices and posts them to the Financials applications.

Use this [task](#) every time you want a new batch of invoices or to re-print an existing invoice. You also use this [task](#) when you require credit and re-invoice to print the re-invoicing of [contract](#) credits and to produce [contract](#) credit notes.

Note: Invoice numbers are retrieved for the [Branch](#) if they have been set up at that level

Invoice Generation

This only processes the [pending invoice lines](#) already produced by the Price [Contracts task](#) for your current [branch](#). It removes [pending invoice lines](#) with an availability date less than or equal to the entered date from the pending invoice file and consolidates them into invoice headers and lines.

Invoice generation creates invoices for the [contract](#) invoice Bill To account. Whenever there is a change in [contract owner](#), the [contract](#) invoice prints the name and first address line of the [contract owner](#) before printing the equipment line.

If you use the interfaces to the ledgers, Equipment Servicing automatically posts invoice values in the following ways:

- Equipment Servicing posts [Accounts Receivable](#) postings directly to the open period, unless the Equipment Servicing [accounting period](#) is later than that of [Accounts Receivable](#).
- If you do not use [AFI](#), Equipment Servicing takes the GL account codes and the current [accounting period](#) to which to post the transactions from the Equipment Servicing [company](#) profile. It posts values to Debtors, Sales, Tax and Deferred Revenue accounts.
- If you have Advanced Financial Integrator ([AFI](#)) active, Equipment Servicing uses the account codes set in the journal conditions.

Contract Deferred Revenue Posting

Equipment Servicing defers the revenue (sales value) from [contract](#) invoices for [contracts](#) billed in advance across the [accounting periods](#) covered by the [invoice term](#).

It posts the total value of the invoices to the deferred income GL account. It also creates pairs of journal entries to transfer the appropriate posting values to the [contract](#) sales GL account, in each [accounting period](#) within the [invoice term](#). Equipment Servicing calculates the value of the journal postings for an invoice line as follows:

- It calculates the number of deferred revenue posting days between the From and To date. (The day type for the date indicates a deferred revenue posting day. You define this in the Daily Calendar file and under parameter DAYT.)
- It divides the line value by the number of deferred revenue posting days, to give a posting value per day.
- It multiplies the number of deferred revenue posting days in each [accounting period](#), or part period, within the invoice From and To dates by the value per day, to give the posting amount for the period.

Note: There is no back-deferral of revenue for advance [contracts](#) invoiced for a period which spans previous [accounting periods](#). In this case, Equipment Servicing accumulates the posting values for the previous periods into the current period.

Note: [Contracts](#) invoiced in arrears, and all [job](#) invoices, have their full invoice value posted to the current [accounting period](#).

Invoice and Contract Credits Print

This batch [job](#) prints, in invoice number sequence, [contract](#) invoices generated by the previous processing and any others for which you requested a copy.

Where the [contract](#) credits procedure requires a credit note, or a credit and a re-invoice, you must use this [task](#) to print the re-invoice and all [contract](#) credit notes.

Running this [task](#) allocates invoice and [contract](#) credit note numbers, generates and prints invoices and [contract](#) credits, and generates postings for [Accounts Receivable](#) and the [General Ledger](#).

If you never run this [task](#), you will never produce any [contract](#) invoices or credit notes.

Equipment Servicing and the Euro

Currency rates are held against transactions.

Each time the software converts an invoice line from prime currency to base currency, the value is converted by taking into account Euro considerations.

In a non-Euro situation, the software calculates base invoice header values by adding together the base invoice line goods, VAT and totals.

Caution: Due to Euro rounding, the invoice header base total values may not be a sum of the lines.

Generate and Print Invoices Window

To display this window, select the Generate and Print [Contract](#) Invoices [task](#).

Use this window to select the invoices you want to generate and print.

Fields

Contract Invoices to Process

Select one of the following:

Standard (0) - To include only standard [pending invoice lines](#) generated by [contract](#) pricing, on the invoices

These are service and rental billing types.

Reconciliation/Interim (1) - To include only reconciliation and interim [pending invoice lines](#) generated by [contract](#) pricing, on the invoices

Both (2) - To include all pending [contract](#) invoice lines on the invoices

Note: The actual [pending invoice line](#) selection depends on the consolidation level set in the account's *Additional Service Details* file and carried through to the [site's](#) record. Consolidation is also affected by currency and tax regime breaks.

Select Run Type

Enter one of the following:

Actual Invoicing (0) - To generate invoices and post the invoice details to [Accounts Receivable](#) (if installed)

Fictive Invoicing (1) - To generate invoices, but not post the invoice details

Note: You make the actual or fictive selection in the [contract](#) header record.

Process Invoice Lines Due On or Before

Enter or select the date, in DDMMYY format, used to select invoice pending lines to convert to invoices.

When you price [jobs](#) and [contracts](#), the priced lines have an available date to show when you can post these lines to the ledgers, and produce an invoice.

The run only includes lines not processed before, with an available date less than or equal to the selected date. You can also use this to print copy invoices (for [job](#) or [contract](#) invoices) and all [contract](#) credit notes.

Note: For priced [jobs](#), the available date is the date on which they were priced, so you can invoice them immediately. For [contracts](#) priced in advance, the available date is the start date of the [invoice term](#) or installment period. For [contracts](#) priced in arrears, the available date is the end date of the [invoice term](#) or installment period.

Note: When a customer has extended [terms](#) on the Customer master file, a Payment Schedule of multiple invoices with different suffixes are generated but only if the EQ descriptions control flag is set to '1' (parameter DFLT/EXTP)

Select **Submit Job (F8)** to start the batch [job](#).

Generate and Print Job Invoices [4/EQI]

Use this [task](#) to find the available [job](#) or proforma [pending invoice lines](#) for your [branch](#). This produces the invoices and posts them to the Financials applications.

Use this [task](#) every time you want a new batch of invoices or to re-print an existing invoice. You also use this [task](#) when you require credit and re-invoice documents to print.

The EQ [Job](#) Invoice Generation [task](#) may be run in Machine [Manager](#) for a specified [company](#). Each EQ [Branch](#) in the [Company](#) will be processed with the Machine date used as the 'Invoice to' date.

This function copies service lines and ensures that Parts lines are copied too.

Invoice Generation

This only processes the [pending invoice lines](#) already produced by the [Job](#) Completion or Complete [Jobs tasks](#). It uses [pending invoice lines](#) with an availability date less than or equal to the entered date from the Pending Invoice file and consolidates them into invoice headers and lines.

Invoice generation creates invoices for the [job](#) invoice Bill To account.

If you use the interfaces to the ledgers, Equipment Servicing automatically posts invoice values in the following ways:

- It posts [Accounts Receivable](#) postings directly to the open period, unless the Equipment Servicing [Accounting period](#) is later than that of [Accounts Receivable](#).
- If you do not use [AFI](#), it takes the GL account codes and the current [accounting period](#) to which to post the transactions from the Equipment Servicing [company](#) profile. It posts values to Debtors, Sales, Tax and Deferred Revenue accounts.
- If you have Advanced Financial Integrator ([AFI](#)) active, it uses the account codes set in the journal conditions.

[Jobs](#) with a [job category](#) of Part Tax Only (India function) will have no invoice line value and will use the Retail value of the part on the lines to retrieve and return tax values from the tax engine. They will be assigned an Invoice number in the same range as any other [job](#) invoice even though the invoice will not be posted to the [Accounts Receivable](#) application.

Note: Invoice/credit notes numbers are retrieved for the [Branch](#) if they have been set up at that level

Invoice Print

Running this [task](#) allocates invoice and credit note numbers, generates and prints invoices and credits, and generates postings for [Accounts Receivable](#) and the [General Ledger](#).

If you never run this [task](#), you will never produce any [job](#) invoices or credit notes.

Equipment Servicing and the Euro

Currency rates are held on transactions.

Each time the software converts an invoice line from prime currency to base currency, the value is converted by taking into account Euro considerations.

In a non-Euro situation, the software calculates base invoice header values by adding together the base invoice line goods, VAT and totals.

In the Euro situation, the Prime Grand Total is converted to the Base Grand Total (using triangulation).

Caution: Due to Euro roundings, the invoice header base total values may not be a sum of the lines.

Part Tax Only Invoices

EQ Posting program

If the invoice is for a Part Tax Only [job category](#) then posting to the [Accounts receivable](#) application is prevented.

Job Invoice Print Program

If the invoice is for a 'Part Tax Only [job category](#) then the Retail value is printed rather than the Invoice Line value. The Retail value is for Tax calculations only. The total value of the invoice is zero: it only has a tax value.

Generate and Print Job Invoices Window

To display this window, select the Generate and Print [Job Invoices](#) [task](#).

Use this window to select the invoices you want to generate and print.

Fields

Invoice Type

Select one of the following:

[Job](#) Invoicing

Proforma

Note: The actual [pending invoice line](#) selection depends on the consolidation level set in the account's Additional Service Details file and carried through to the [site's](#) record. Consolidation is also affected by currency and tax regime breaks.

Process Invoice Lines Due Between/To

Enter or select the date range, in DDMMYY format, used to select invoice pending lines to convert to invoices.

When you release [jobs](#), the priced invoice pending lines have an available date to show when you can post these lines to the ledgers, and produce an invoice.

The run only includes lines not processed before, with an available date less than or equal to the selected date. You can also use this to print copy invoices (for [job](#) invoices).

Note: For priced [jobs](#), the available date is the date on which they became pending invoice records, so you can invoice them immediately.

Note: If pending invoice maintenance is required for the [job category](#), the available date will be set to 999999 and it will not be possible to invoice the transactions.

Account Number/Location

If invoices are to be produced for just a single customer, enter a valid customer code and delivery point.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Note: If an account number and [location](#) are entered, the [job](#) number and [job category](#) should be left blank.

Job Number

If invoices are to be produced for just a single [job](#), enter the [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Note: If the [job](#) number is entered, the account number and [location](#) and the [job category](#) should be left blank.

Job Category

If invoices are to be produced for a single [job category](#), enter the category.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Note: If the [job category](#) is entered, the account number and [location](#) and [job](#) number should be left blank.

Note: When a customer has extended [terms](#) on the Customer master file, a Payment Schedule of multiple invoices with different suffixes are generated but only if the EQ descriptions control flag is set to '1' (parameter DFLT/EXTP)

Select **Submit Job (F8)** to start the batch [job](#).

Create Sundry Invoices [5/EQI]

Use this [task](#) when you need to generate a free-format sundry invoice for a customer.

You can specify the [model](#), [serial number](#) and related [contract](#) details. You use these details to record the revenue from the sundry invoice against the correct equipment and [contract](#). None of these details prints on the invoice.

There is no automatic pricing of any sort.

Equipment Servicing adds the transactions to the [Accounts Receivable](#) and [General Ledger](#) interface files as it creates the sundry invoices, and posts them to the current [accounting period](#).

You can print the entered invoices using the Print Sundry Invoices/Credit Notes [task](#).

Note: Sundry invoice numbers are retrieved for the [Branch](#) if they have been set up at that level

Sundry Invoice Entry Window

To display this window, select the Create Sundry Invoices [task](#).

Use this window to select the customer, currency and [model](#) details for the sundry invoice.

Fields

Account Number

Enter a customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Account Address

Enter the customer's address sequence.

Fiscal Type

Enter the fiscal type to be used when billing the transactions for this invoice.

A prompt is available with type 09.

Customer Order No

Enter the reference number, using up to 20 alphanumeric characters.

This is the basis for the creation of the sundry invoice or credit note.

Original Doc Ref.

Enter the document reference, using up to 15 alphanumeric characters. This can be any document to which this sundry invoice or credit note refers.

Reason Code

Enter the reason for the invoice.

Alternatively, use the prompt facility to select from the Credit Reason Code pop-up.

Model Number

Enter a [model](#), using up to 15 alphanumeric characters.

Serial Number

Enter a [serial number](#), using up to 15 alphanumeric characters.

Contract No

Enter a [contract](#) number, using up to 7 alphanumeric characters.

Contract Type

Enter a [contract type](#) for the entered [contract](#) number, using up to three alphanumeric characters.

Start Date

Enter or select the actual start date (in DDMMYY format) of the [contract](#) and [contract type](#).

Currency Code

To overwrite the [site's](#) default values, enter the currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

The following fields are not available for input and values have to be entered using the **Override Currency Rate (F6)** function.

Currency Rate Code**Currency Rate****Multiply/Divide****Functions**

Override Currency Rate (F6)

Use this to override currency details for transactions where currencies are not linked to the Euro. Press Enter to display the Sundry Invoice Entry Detail window.

Sundry Invoice Entry Detail Window

To display this window, press Enter on the Sundry Invoice Entry window. Use this window to enter the description and values for the sundry invoice.

Fields**No.**

This field displays the line number, generated by Equipment Servicing.

Description: Lines 1 to 3

Enter up to three lines of free-form text per value entered, to print on the sundry invoice.

VAT

Enter the VAT code. This must be defined to [General Ledger](#).

Value VAT Value

Enter either a line value or VAT value. If you enter a VAT value, it must equal Value x VAT Rate %. Equipment Servicing calculates this value when you press Enter and prints it on the sundry invoice.

Note: If tax engine in use the tax code entry field is not displayed and the tax value field is output only.

Note: If India active the SAC code field is displayed and entry is mandatory

Functions**Text (F21)**

Use this to enter or maintain the invoice header text.

Note: When a customer has extended [terms](#) on the Customer master file, a Payment Schedule of multiple invoices with different suffixes are generated but only if the EQ descriptions control flag is set to '1' (parameter DFLT/EXTP)

Invoice reversal (F15)

All add lines (F10) and Change default (F14) in Invoice reversal will be inhibited in India mode.

The tax code will be hidden in India mode and the tax value output only. When the user has made changes a [call](#) will be made to the tax engine to calculate the new tax value and this will be displayed in the tax field.

All 'reversed lines' will inherit the SAC code of the original Invoice line (EQP46I) in India mode. It cannot be changed.

The tax value will be processed as per current tax engine processing.

Select **Update (F8)** to save any changes.

Create Sundry Credit Notes [6/EQI]

Use this [task](#) to enter all free-format and [job](#) invoice reversal credit notes.

Note: Sundry credit notes numbers are retrieved for the [Branch](#) if they have been set up at that level

Note: You cannot use this [task](#) to reverse a [contract](#) invoice. You can only reverse a [job](#) invoice.

Description

You can enter two types of credit note:

A free-format credit note (similar to the free-format invoice)

A [job](#) invoice reversal credit note, so you can fully or partially reverse an existing [job](#) invoice to produce a credit note

For both types of credit note, you must enter a customer order reference. If you need physical stock adjustments, you must enter separate inventory movements.

For a free-format credit note, enter the [model](#) or [serial number](#) and any related [contract](#) details required. Equipment Servicing uses these for revenue reporting to subtract the sundry credit note value from the revenue associated with the equipment and [contract](#).

If you enter machine or [contract](#) details, the customer must be the Bill To customer, if one exists. If Bill To overrides exist, you cannot raise invoices or credits for the [site](#) account.

For a [job](#) invoice reversal credit note, you enter the invoice number to reverse (or use as a base) and, optionally, a [job](#) number and technical report number from this invoice. The displayed invoice lines form the basis of the credit note. You can add, change and delete lines, until you get the correct credit note lines and you can complete the credit note. Each line on the credit note has a [job category](#), technician, and [model](#) or [serial number](#) recorded on it. Equipment Servicing subtracts the credit note values from the detailed service revenue analysis figures.

As you create the sundry credit notes, Equipment Servicing adds the transactions to the [Accounts Receivable](#) and [General Ledger](#) interface files and posts them to the current [accounting period](#).

You can print the credit notes created using the Print Sundry Invoices/Credit Notes [task](#).

Credit Note Entry Window

To display this window, select the Create Sundry Credit Notes [task](#).

Use this window to select the account or customer or [model](#) or both, for which you want to create credit notes.

If the Turkey function is active, only a limited number of fields are available for entry.

When returned invoice details have been entered, some details are displayed from the returned invoice and may not be overridden.

Fields

Account Number

Enter an existing customer account.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If you enter machine details, this must be the [ownership](#) account, if there is one. Otherwise, the [site](#) account is used. If you enter [contract](#) details, this must be either the [contract](#) bill to account or [job](#) bill to account, if one exists. Otherwise, the customer on the [contract](#) header is used.

Account Address

Enter the address for the customer account sequence.

Fiscal Type

Enter the fiscal type to be used when billing the transactions for this credit note.

A prompt is available with type 09.

Customer Order No.

Enter the authorisation for the creation of the credit note.

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Reason Code

Enter the reason for the credit.

Alternatively, use the prompt facility to select from the Credit Reason Code pop-up.

Note: *If the Turkey function is active, this is not available for entry initially; when returned invoice details have been entered, this is displayed from the returned invoice and may not be overridden*

Original Doc Ref.

Enter the reference of any document to which this credit note refers.

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Invoice Number

Enter an existing [job](#) invoice number. You cannot enter a [contract](#) invoice number. Use this and select **Invoice Reversal (F15)** to maintain the invoice lines.

Note: *If the Turkey function is active, this is not available for entry initially; when returned invoice details have been entered, this is displayed from the returned invoice and may not be overridden*

Job Number

Enter a [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up. This displays invoice lines with this [job](#) number. You must enter an invoice number and then select **Invoice Reversal (F15)**.

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Model Number

Enter the machine [model](#).

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Serial Number

Enter the [serial number](#). This must be for the entered [model](#) and on the [installation](#) record for the entered account and address codes.

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Contract No.

Enter the [contract](#) number. This must be for this customer and equipment.

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Contract Type

Enter the [contract type](#). This must be pending or active on this [contract](#).

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Start Date

If you entered a [model](#) and [serial number](#), enter or select the start date.

Note: *If the Turkey function is active, this is not available for entry until returned invoice details have been added*

Currency Code

Enter the currency code.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Leave this field blank to use the default currency.

Note: *If the Turkey function is active, this is not available for entry initially; when returned invoice details have been entered, this is displayed from the returned invoice and may not be overridden*

The following fields are not available for input and values have to be entered using the **Override Currency Rate (F6)** function.

- **Currency Rate Code**
- **Currency Rate**
- **Multiply/Divide**

Note: If tax engine in use the tax code entry field is not displayed and the tax value field is output only.

Note: If India active the SAC code field is displayed and entry is mandatory

Functions

Override Currency Rate (F6)

Use this to override currency details for transactions where currencies are not linked to the Euro.

Invoice Reversal (F15)

Use this to display the Credit Notes Invoice Reversal window for [job](#) invoices only.

If India function active:

- All add lines (F10) and Change default (F14) in Invoice reversal is inhibited
- The tax code is hidden and the tax value output only. When the user has made changes a [call](#) is made to the tax engine to calculate the new tax value and display it in the tax field.
- All 'reversed lines' inherit the SAC code of the original Invoice line and cannot be changed.

Note: Job invoices with a Job category of Part Tax Only cannot be reversed.

Make your selection and then press Enter to display the Credit Note Entry Detail window.

Note: The Credit Note Entry Detail window is the same as the Sundry Invoice Entry Detail window.

Customer Returned Invoice (EQ) Window

If Turkey function active only

Use this window to enter details of the applicable customer returned invoice details

Fields

Returned Invoice Reason code

Use this to enter the reason code for the returned invoice

This is mandatory

A prompt is available

Returned Invoice Number

Use this to enter the number for the returned invoice if applicable.

This is mandatory for a price difference credit; it must be blank for a cancelled invoice credit

Returned Invoice Date

Use this to enter the date for the returned invoice if applicable.

This is mandatory for a price difference credit; it must be blank for a cancelled invoice credit

Returned Invoice Currency

Use this to enter the currency for the returned invoice if applicable.

This is mandatory for a price difference credit; it must be blank for a cancelled invoice credit

A prompt is available.

It **MUST** be the same currency as the original invoice (where one is entered)

Returned Invoice Rate

Use this to enter the exchange rate for the returned invoice if applicable.

This is the exchange rate between the returned invoice currency and the legal reporting currency (on the Turkey [company](#) profile), not the base currency

This is mandatory for a price difference credit; it must be blank for a cancelled invoice credit

Returned Invoice Multiple/Divide

Use this to enter the exchange rate M/D for the returned invoice if applicable.

This is mandatory for a price difference credit; it must be blank for a cancelled invoice credit

Original Invoice Number

Use this to enter the original invoice number

This is mandatory

Press ENTER to validate the data and Update (F8) to add the returned invoice details and re-display the Credit Note Entry window

Credit Notes Invoice Reversal Window

To display this window, select **Invoice Reversal (F15)** on the Credit Note Entry window.

Use this window to maintain the invoice line details. The total value of the original invoice and the total value of the invoice lines still visible on the window are displayed.

Note: To enter a new invoice line, enter the details at the bottom of the window and then select **Add (F10)**. To enter a different invoice line type, select **Change Prompt (F14)**, until the type required is displayed.

Fields

Note: There are six invoice line types and six credit note line types. The following details the common fields and then the fields unique to each invoice line type.

Common Fields

Model

Enter a valid [model](#) number.

Ser

Enter the [serial number](#) of a piece of equipment to which the credit note relates.

Eng. No

Enter a technician defined to Equipment Servicing.

***Note:** This information is normally defaulted in from the transaction being credited.*

Job Cat

Enter a [job category](#) defined to Equipment Servicing.

VAT

Enter a VAT code defined to [General Ledger](#).

VAT Value (Untitled)

Enter the VAT value. If you leave this field blank, Equipment Servicing calculates the VAT.

Labour Hours

Time

Enter the labour hours and minutes to credit. This is not displayed for a fixed labour hours override.

Rate

Enter the labour rate per hour to use in the calculation. This is not displayed for a fixed labour hours override.

Value

Enter the value. This is the Labour Time x Rate per Hour, or the Fixed Labour override, if applicable.

Total Value

This field displays the value plus the VAT value.

Parts Used

Part Number (Untitled)

Enter a part number from the Inventory Item Master file.

Qty

Enter the number to credit.

***Note:** This has no effect on physical stock levels. You must process separate inventory movements to adjust physical stocks.*

Unit Prc

Enter the price per unit.

Value

This is the value of the line (Unit Price x Quantity).

Discount

Enter the discount for this line. You must have specified a parts discount list code in the [site's](#) additional service details.

Total Value

This field displays Value - Discount + VAT Value.

***Note:** If the discount value no longer applies, delete the line and then add a new one.*

Miscellaneous Charges**Misc (Untitled)**

Enter the charge type to credit. This must be a valid [charge code](#) as created within the Maintain [Charge Codes task](#).

The description is displayed.

Value

Enter the value of the charge to credit.

Total Value

This field displays the value plus the VAT value.

Contract Visit Fee**Value**

Enter the value of the [visit](#) fee to credit.

Total Value

This field displays the value plus the VAT value.

Travel Hours**Time**

Enter the travel time to credit. This is not displayed for a fixed travel hours override.

Rate

Enter the rate per hour. This is not displayed for a fixed travel hours override.

Value

Enter the fixed travel override. If you enter a travel time and rate this is the travel time x rate per hour.

Total Value

This field displays the value plus the VAT value.

Mileage**Miles/Klms**

Enter the distance travelled in miles or kilometres. This is only displayed for an actual distance driven record.

Zone Code

Enter the zone, if set up in the [site's](#) additional service details. This is only displayed for a zone charge.

Value

This is the distance travelled charge. For standard distance and actual distance driven, the details are from the [site's](#) additional service details, for a zone charge, this is from the zone code and the Zone Charge file.

Total Value

This field displays the line value plus the VAT value.

Options**Select**

Use this to maintain a record in the fields at the bottom of the window.

Delete

Use this to delete an existing record. You must confirm this by selecting **Delete (F11)** again. *END is displayed next to the line.

Functions**Add (F10)**

Use this to add a newly-entered line to the credit note.

Fold/Truncate (F13)

Use this to toggle between displaying summary and extra details for the invoice lines.

Chg Prompt (F14)

Use this to change the fields displayed at the bottom of the window so that you can enter any of the other credit note line types.

Job Story (F16)

Use this to maintain the [job](#) header text.

Crd. Text (F21)

Use this to enter text that prints on the credit note.

Finish Credit (F22)

Use this to create the credit note and post to the [Accounts Receivable](#) and [General Ledger](#) interface files. The value of the credit note is displayed at the top of the window. This equals the total value of the invoice lines still visible on the window.

Select **Finish Credit (F22)** to complete the credit note.

Print Sundry Invoices/Credit Notes [7/EQI]

Use this [task](#) to print previously entered sundry invoices and credit notes.

Note: Use the *Generate and Print [Contract Invoices](#) [task](#)* to print [contract](#) credit notes.

The [task](#) submits a batch [job](#) to print sundry invoices and credit notes either that you have entered but not yet printed, or that you have requested for re-print using the Request Copy Document [task](#).

Select **Confirm Submit (F8)** to submit a [job](#) to perform the processing.

Request Copy Document [8/EQI]

Use this [task](#) to re-print documentation that was lost or damaged during printing.

You can re-print:

- Invoices
- Credit Notes
- Proformas

Request Copy Document Selection Window

To display this window, select the Request Copy Document [task](#).

Use this window to select the document you want to re-print.

Fields

Enter Number of Invoice to be Reprinted

Enter the number of the invoice you want to re-print.

Enter Number of Credit Note to be Reprinted

Enter the number of the credit note you want to re-print.

Print Format

Select one of the following:

Detail

Summary

Partial

The selected format may be different from the customer default format that is used in the Generate and Print [Job Invoices task](#).

Press Enter to display the Request Copy Document Details window.

Request Copy Document Details Window

To display this window, press Enter on the Request Copy Document Selection window.

This window displays the details of the item you selected for confirmation.

Select **Confirm Print (F8)** to re-print the displayed document.

Meter Corrections Entry [9/EQI]

Use this [task](#) to change the meter readings for a disputed invoice.

Meter Corrections Entry Selection Window

To display this window, select the Meter Corrections Entry [task](#).

Use this window to select the invoice for which you want to enter a corrected meter reading.

Fields

Disputed Invoice

Enter the invoice number.

Invoice Date

Enter the invoice date.

Enter the details and then press Enter to display the Meter Corrections Entry Details window.

Meter Corrections Entry Details Window

To display this window, enter the details and then press Enter on the Meter Corrections Entry Selection window.

Use this window to enter the corrected meter reading.

Fields

Contract Number

Enter the [contract](#) number for the selected invoice.

Serial Number

Enter the [serial number](#) of the machine.

Contract Type

Enter the [contract type](#) for this invoice.

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

Model

Enter the [model](#) for this reading correction.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Contract Date

Enter or select the start date of the [contract](#).

Meter 1 Correct Reading

Enter the new meter reading.

Meter 2 Correct Reading

Enter the new meter reading.

Functions

Trailer (F13)

Use this to display the [Job](#) History Misc. Charges window.

Meter History (F14)

Use this to display the Meter Reading History window.

Enter the new meter reading and then press Enter to display the Meter Corrections Entry Summary window.

Job History Misc. Charges Window

To display this window, enter the machine information and then select **Trailer (F13)** on the Meter Corrections Entry Details window.

Use this window to amend or add corrected meter readings. For each [model](#), the [contract](#) number, [contract type](#), date, [serial number](#), [model](#) and number of meters are displayed, as well as indication as to whether a credit note is required.

Fields

Select

Select one of the following:

Amend - To maintain the corrected meter reading

Delete - To delete the corrected meter reading

Functions

Add (F10)

Use this to add new meter corrections using the Meter Entry Correction Details window.

Select **Update (F8)** to save the entered readings.

Meter Correction Entry Summary Window

To display this window, enter the details on the Meter Corrections Entry Details window and then press Enter.

This window displays the entered details and a message stating whether credit notes will be produced.

Note: Press Enter to clear the message.

Functions

Meter History (F14)

Use this to display the Meter Reading History window for the selected machine.

Select **Accept (F8)** to save the details and, where relevant, produce the credit notes.

Correct Counting Meters [10/EQI]

You can correct readings for counting meters on a piece of equipment using this [task](#). You can correct the readings on meter numbers three and above that were entered on the same date as readings on the invoice meters one and two.

Correct Counting Meters Selection Window

To display this window, select the Correct Counting Meters [task](#).

Use this window to select the machine for which you want to correct a counting meter.

Fields

Serial Number

Enter the [serial number](#) of the [model](#).

Model

Enter the model for which you want to correct a counting meter.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Enter the [model](#) and leave the [serial number](#) blank and then press Enter to display a list of possible [serial numbers](#).

Contract Number

Enter the [contract](#) for which the meter reading is made.

Alternatively, use the prompt facility to select from the [Contract](#) Selection pop-up.

Type

Enter the [contract type](#).

Date

Enter or select the [contract](#) date.

Press Enter to display the Correct Counting Meters window.

Correct Counting Meters Window

To display this window, enter the selection criteria and then press Enter on the Correct Counting Meters Selection window.

Use this window to enter the corrected meter readings.

Options

History

Use this to displays a list of all historical readings for the meter selected.

Meter Reading Maintenance

Use this to maintain all historical readings for the meter selected and display the Correct Counting Meters Maintenance window.

Correct Counting Meters Maintenance Window

To display this window, select Meter Reading Maintenance against a meter on the Correct Counting Meters window.

Use this window to view all readings for the selected meter and/or amend any reading.

Note: A reading may be amended unless it has an invoiced reading with a later date or a subsequent reading has been overridden. Use the Meter Corrections [task](#) to change invoice readings.

Fields

Select

Select one of the following:

Amend Reading - To select the reading for amendment

Delete Reading - To delete a reading

When all required amendments have been made, select **Previous (F12)** to return to the Correct Counting Meters window.

Maintain Pending Invoice Line [11/EQI]

Use this [task](#) to amend priced, [pending invoice lines](#) for [jobs](#) before invoicing.

Enter the [job](#) number you want to edit. This displays all the chargeable [job lines](#) for selection.

Select a [job line](#) to display the charge, the rate and the factor (time etc.) if applicable. You can change any of these.

The batch [job](#) produces an audit report, whether or not you make any changes.

Pending Job Invoice Maintenance Selection Window

To display this window, select the Maintain [Pending Invoice Line task](#).

Use this window to select the [job](#) or customer for which you want to create a pending [job](#) invoice.

Fields

Note: You either enter [job](#) number, [job category](#) or customer details.

Job Number

Enter the required [job](#) number. This must be a [job](#) for this [branch](#) with an invoice type of P (Pending) or J ([Job](#)).

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Job Category

Enter the required [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Account

Enter the required customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Location

Enter the required customer address sequence.

Proforma Payment

Use this checkbox as follows:

Unchecked - To display the details of proposed proformas and invoices

Checked - To display the details of printed proformas that require payment

Enter the selection criteria and then press Enter to display the Pending [Job](#) List window.

Pending Job List Window

To display this window, check the Proforma Payment field and then press Enter on the Pending [Job](#) Invoice Maintenance Selection window.

This window displays the [jobs](#) that have pending transactions and allows you to release or select for detail viewing/amendments.

Tax Engine and Nota Fiscal restrictions

It is not possible to release or print a [Pending Invoice line](#) if the Nota Fiscal engine (Parameter 65 in GL Country Specific parameters) is switched on in the [General Ledger](#), and there are mixed transactions on the [Pending Invoice line](#).

The mutually exclusive [transaction types](#) are:

- Chargeable Parts
- Non-Chargeable Parts
- Other Service items

Use the select option and drill down to the individual lines and release them separately

Note: *Parts Tax Only Invoice lines cannot be selected for maintenance*

Note: *For India, [Quotation](#) and Fixed Price [jobs](#) are available for maintenance but only to allow changes to Fiscal code and Indian details (SAC code)*

Fields

Select

Select one of the following:

Select (1) - To view the Pending Sub [Job](#) List window

Fiscal (2) – To maintain the [job](#) fiscal type

India (3) - Use this to amend the SAC code associated with the [pending Invoice line](#).

Note: *This is not applicable to parts lines.*

Withholding tax (4) - To remove or override the withholding tax on all labour lines.

Note: *This is only applicable in Turkey for a Customer subject to withholding tax on labour.*

Reset (5) – To reset and remove the pending invoice records and reset the transaction records so that they can be processed through [Job](#) Completion [9/EQS] again. You can do this to change the chargeability of individual invoice pending lines that have been processed through to Pending Invoice maintenance in error.

Note: *This option is only displayed when running with GL parameter Nota Fiscal Engine (65) set to 'on'*

Print Invoice (6) - To print the invoice for this [job](#)

Release Invoice (8) - To release the invoice

The next invoicing batch run includes all the transactions for this [job](#). This sets the available date to the current date.

Structure Enquiry (9) - To view the [job](#) structure enquiry

For further details of this enquiry, see the Enquire on [Job](#) History section in the Service Operations chapter of this product guide.

Select a line and then press Enter to display the Pending Sub [Job](#) List window.

Pending Sub Job List Window

To display this window, select a [job](#) and then press Enter on the Pending [Job](#) List window.

This window displays the [sub-jobs](#) and [tasks](#) for the selected [job](#) that have pending transactions and allows you to release or select for detail viewing/amendments.

Fields**Select**

Select one of the following:

Select (1) - To view further details of the transactions for the [job](#)

Print Invoice (6) - To print the invoice for this [job](#)

Release Invoice (8) - To release the invoice

The next invoicing batch run includes this [job](#). This sets the available date to the current date and releases all transactions for the [sub-job/task](#) selected. All other transactions for the [job](#) remain pending and unavailable for the Invoice Print operation.

Structure Enquiry (9) - To view the [job](#) structure enquiry

For further details of this enquiry, see the Enquire on [Job](#) History section in the Service Operations chapter of this product guide.

Select a line and then press Enter to display the Pending [Job](#) Invoice Maintenance Line Details window.

Pending Job Invoice Maintenance Line Details Window

To display this window, select a specific [job/sub-job/task](#) line and then press Enter on the Pending Sub [Job](#) List window.

This window displays the total [cost](#), charges and margin for the selected invoice, and the [cost](#), charge and margin for each invoice line.

Fields

Invoice To

Enter the customer and address to which to send the invoice. This defaults to the account customer and [location](#).

Job Discount %age

Enter the percentage discount for this [job](#).

Options

Select

Use this to maintain the invoice line on the Pending Invoice Maintenance Line Details window.

India

India only

Use this to change the India details i.e. SAC code if applicable

All update functions such as discounts, invoice to customer and the ability to drill down to the next level to change values are removed when maintaining [Quotation](#) and Fixed price [jobs](#).

In addition it is not possible to partially release [Quotation jobs](#). The entire [job](#) must be released or invoiced from the Initial listing panel.

Note: Only the Chargeable quote lines are available for maintenance. The 'actual' booking lines will not be reported for GST and therefore do not need to be maintainable here.

Zeroise

Use this to set the line value to zero, so that you do not charge for this invoice line.

Note: The [costs](#) remain against the transaction line; only the invoice values are cleared. This enables [AFI](#) to process [costs](#) for the line.

Invoice Customer

Use this to change the invoice to customer for the specified line.

To use this facility, select the chosen lines with this option and change the invoice to customer at the top. When either **Update (F8)** or **Update&Print (F14)** is selected, the customer is changed for the selected lines and they will disappear from this view.

This allows for the scenario where some lines are to be invoiced to one customer and others to other customers.

Functions

Update&Release (F8)

Use this to save any changes and update all the available dates to the current date. You can now invoice all [pending invoice lines](#) for this [sub-job/task](#).

Update&Print (F14)

Use this to update (as **Update (F8)**) and generate and print the invoices for each transaction shown for the selected [sub-job/task](#).

Update (F16)

Use this to save any changes without releasing the invoices.

Fixed Price (F17)

Use this to generate a fixed price for all the transactions shown. The Fixed Price window is displayed.

Payment Terms (F20)

Use this to display a pop-up, so that you can enter the payment method (validated against the Codes/Parameters file, type PAYT), credit card number and expiry date. This is for memo purposes only.

Invoice Text (F22)

Use this to enter the text to print on the invoice.

Select a line to display the Pending Invoice Maintenance Line Details window.

Pending Invoice Maintenance Line Details Window

To display this window, select a line on the Pending [Job](#) Invoice Maintenance Line Details window.

Use this window to enter the invoice line details. The layout of the lower part of the window varies, depending on the invoice line type selected on the previous window.

This window displays the [job](#) number, [model](#), invoice line type, technician and currency code.

Fields

Line Value

Enter the new line value.

Disc%

Enter a discount percentage, which is used to calculate a new line value by re-calculating the line value and applying the percentage margin.

VAT Code

Enter the new VAT code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

The fields below will vary depending on the type of line being amended:

Hourly Rate/Parts Price

Enter the new [job](#) pricing value.

The hourly rate is extracted from the labour price list selected from the hierarchy.

The parts price is from the parts price list retrieved using the price list hierarchy.

Hours/Misc Charge Type/Part Number

Enter the [job](#) pricing value. You cannot change the part number. The details are from the original transaction.

You set up [charge codes](#) via the Maintain [Charge Codes task](#).

Hours Type Code/Parts Quantity Used

Enter the [job](#) pricing value. These details are from the original transaction entered.

You set up [uplift codes](#) in the Maintain [Timesheet Uplift Codes task](#).

Parts Quantity Used (Cont)

Enter the [job](#) pricing value. The details are from the original transaction entered.

Select **Update (F8)** to save any changes.

Fixed Price Window

To display this window, select **Fixed Price (F17)** on the Pending [Job](#) Invoice Maintenance Line Details window.

Use this window to define a fixed price for the transactions listed against the [sub-job/task](#).

The window shows the [job category](#) and the Invoice To customer details for confirmation.

It allows you to generate an additional transaction that is added to the pending lines, which is designated as a ZP transaction (Fixed Price), and the selling prices of the other transactions on the previous window are set to **0**.

The [costs](#) on the additional ZP transaction are set to **0** and the [costs](#) on the originating transactions are left unchanged.

Fields

Note: *You can only enter a single fixed price for all the listed transactions.*

Price

This is the total price to be charged for the group of transactions listed.

Reason Code

Enter a reason code for the required [job category](#).

Alternatively, use the prompt facility to select from the RSNC Reason Code pop-up.

Note: *Once **Update (F8)** has been selected, the fixed price is shown on the previous window BUT it is not fully updated so it is still possible to select **Previous (F12)** from this window and the fixed price lost.*

Select **Update (F8)** to save the fixed price.

Stage Payments [12/EQI]

You use this [task](#) with fixed price [jobs](#) where you receive payments at fixed periods, such as the end of each month. You can also use this for [jobs](#) which make no automatic charge for time and materials.

[Stage payments](#) are automatically generated from fixed price [jobs](#). Depending on the invoice review flag setting, once you submit the Generate and Print [Job Invoices](#) batch [job](#), the software automatically generates an invoice whenever the date of a [stage payment](#) is reached or passed, or whenever you complete all linked [tasks](#). If you have not completed one of several [tasks](#), the software does not invoice any [task](#).

Note: *You define review flags at both [job](#) type and [job](#) detail level.*

In effect, all payments for fixed price [jobs](#) go through the [stage payments](#) process. However, you can enter payment to a fixed price [job](#) as a sundry invoice or credit note. Once you post this transaction, using invoice processing, it is classified as a [stage payment](#), with a payment number and invoice number. You can only enter credit notes for fixed price [jobs](#) using the direct transaction process or the Sundry Invoices/Credit Notes [task](#).

Note: *You can also access [stage payment](#) maintenance using [Stage Payments \(F13\)](#) when you maintain [job](#) details.*

You can enter many lines of [stage payments](#). Use **Page Up** and **Page Down** to display more lines.

Stage Payments Maintenance Selection Window

To display this window, select the [Stage Payments task](#).

Use this window to select the [job](#) for which you want to maintain [stage payments](#).

Fields

Job

Enter the [job](#) for which you want to review or amend [stage payments](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Sub-job

Enter the [sub-job](#) for which you want to review or amend [stage payments](#).

Task

Enter the [task](#) for which you want to review or amend [stage payments](#).

Press Enter to display the [Stage Payments](#) Maintenance window.

Stage Payments Maintenance Window

To display this window, enter the [job/sub-job/task](#) and then press Enter on the [Stage Payments](#) Maintenance Selection window.

Use this window to enter the details for each [stage payment](#). The [job](#), customer and price details are displayed.

Fields

Select

Select one of the following:

Delete (4) - To delete a [stage payment](#) yet submitted to invoice

Maintain External Text (6) - To enter additional text to print on invoices (this defaults to the [job/sub-job/task](#) description)

Activities (7) - To display the linked activities on the [Stage Payments](#) Linkage window

Payment Number

If you have generated a [stage payment](#), the payment number is displayed.

Date

Enter or select the date on which you want to invoice this [stage payment](#). Leave this field blank if you entered a [task](#) code for the payment, as you define dates for [tasks](#).

Stage Value

Enter the value of the [stage payment](#).

VAT

Enter the VAT code. You set these up in [General Ledger](#). This code is used if you set the customer's VAT indicator to **3**. The VAT code in the Customer Master file is used if you set the indicator to **2**.

You can use the prompt facility on this field to select from the Select VAT Code pop-up.

Activity Code

If you want to record an [activity](#) against the [stage payment](#), enter the relevant [activity](#) code here. You cannot enter an [activity](#) code if you enter a date.

You set up [activity](#) codes in the Maintain Codes/Parameters [task](#).

No invoice is produced until you complete all activities.

Inv No

If you have invoiced a [stage payment](#), a payment number and invoice number are displayed. If you need to review the invoice, this field displays **In Revw**.

Retention %

Enter the retention percentage. This is a memo-only field.

Functions**Address Override (F17)**

Use this to maintain the delivery and invoice addresses of the customer. If you have assigned a [parts list](#) to the [job](#) detail, this also updates [Sales Order Processing](#) with any new address. If you have entered an override address, **Address Override (F17)** is highlighted.

Press Enter to save your changes and then select **Exit (F3)** to leave the [task](#).

Service Exchange Maintenance [13/EQI]

Use this [task](#) to assess the current Service Exchange open [jobs](#) being progressed through the system. Service Exchange is usually used for parts that can be returned and refurbished. The customer will receive a fully-invoiced replacement part and a possible partial credit note if the returned part can be refurbished.

Service Exchange [jobs](#) are identified by the [job category](#) on the [job](#), where the [job category](#) has been classified as category type 06. To classify a [job category](#) in this way, use the **Maintain [Job Category task](#) [4/EQM]**.

A service exchange [job](#) must go through a number of status changes.

The statuses are:

01 - Customer to Send

02 - Collect from Customer

- 13 - Evaluation Required
- 14 - Credit Proposed
- 15 - Suggest Reject Credit
- 20 - [Job](#) Open (Available for Work)
- 50 - Work Complete
- 52 - Available for Stock Receipt
- 96 - Claim Rejected
- 99 - Complete and Documented

All of these statuses can be selected in the **Maintain Service Exchange [task](#) [13/EQI]** .

Because Service Exchange [jobs](#) are deemed to be workshop [jobs](#), the initial status set on the [job](#) (and all its lines) is 01 (Customer to Send) or 02 (Collect from Customer).

When the equipment is booked in, the status is always set to 13 (Evaluation Required). These [jobs](#) should be managed through the **Work Control [task](#) [3/EQS]**. The objective is to produce a list of status 13 [jobs](#) and allow a technician to decide whether the equipment is worth refurbishing and the customer should be issued with a credit note, in which case the [job](#) is set to 14 (Credit Proposed). If the technician decides that the equipment is not worth refurbishing, the [job](#) is set to 15 (Suggest Reject Credit).

While the [job](#) is at status 14 or 15 it cannot be progressed through Work Control. Only the **Service Exchange [task](#) [13/EQI]** can progress these [jobs](#).

It is the responsibility of the Service Exchange user to progress the [job](#) either to status 20 ([Job](#) Open) or to status 96 (Claim Rejected).

If the [job](#) is changed to status 20, the user must decide if a credit note is to be issued. Since the purpose of Service Exchange [jobs](#) is to provide customers with an incentive to return equipment that can be refurbished, a credit note is usually raised.

If the [job](#) is changed to status text 96, a Refusal Text Entry window is displayed. Text can be entered for printing on a refusal letter, if required.

[Jobs](#) at status 20 are now available for work and can be progressed as normal through the system. Once they are at status 50 (using the **Timesheet Entry [task](#) [5/EQS]** and have been released through [job](#) completion, the status is automatically set to 52.

This returns control to the Service Exchange [task](#), where the Service Exchange [manager](#) can receive the refurbished item into the Inventory system and the status of the [job](#) can be set to 99.

It is always the responsibility of this user to complete the [job](#) either by rejecting it or by releasing the refurbished item to Inventory.

Maintain Service Exchange Window

To display this window, select the Maintain Service Exchange [task](#).

Use this window to select the customer or [job](#) for which you want to perform Service Exchange maintenance.

Fields

Status Required

Enter one of the following to specify which Exchange status you want to display:

01 - Waiting for Equipment

13 - Evaluation Required

14 - Credit Proposed

15 - Suggest Reject Credit

20 - [Job](#) Open

50 - Work Complete

52 - Available for Stock Receipt

96 - Claim Rejected

99 - Complete and Documented

You can use the prompt facility on this field to select from the Service Exchange Status pop-up.

Note: You must enter a status and one of the following fields:

Account

Enter the customer you require.

Alternatively, use the prompt facility to select from the Customer Scan pop up.

Location

Enter the customer address sequence.

Job Number

Enter the [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Enter the selection criteria and then press Enter to display the Items for Credit window.

Items for Credit Window

To display this window, enter the selection criteria and then press Enter on the Maintain Service Exchange window.

Use this window to maintain [jobs](#) with [job](#) categories eligible for Service Exchange.

This window displays the selection information and, for each [job](#) found, the current status, reason code, [job](#) number, customer details, price, invoice details and date.

Fields

Credit Accepted By

Enter the person who accepted the credit, using 20 alphanumeric characters.

This defaults to the user ID of the operator.

Price

If the credit status is set to 20 ([Job](#) Open) enter the value that is to be issued as an Equipment Servicing credit note.

Options

Release for Work

Use this to update the [job line](#) status to 20 and release it for work. You can also add invoice text that will be printed on the credit note if a price has been entered. The credit note will be generated automatically but you will need to run the Print Sundry Invoices/Credit Notes [task](#) to print it.

Refuse Credit

Use this to update the [job](#) status to 96. You can also add credit refusal text, if required, and this will be printed on a credit refusal letter if you enable it.

Receive into Stock

This only applied to [jobs](#) at status 52 (Available for Stock Receipt) that have been released through [Job Completion \[9/EQS\]](#). Use this to perform a receipt into the default exchange stockroom specified via the Maintain [Branch task](#).

Text

Use this to update credit refusal text.

Details

Use this to maintain the [job](#) structure.

History

Use this to view the history of the [call](#).

Quotation

Use this to enquire on the [quotation](#) for this [job](#), if one exists.

Functions

Sales Order Processing Enquiry (F14)

Use this to display the [Sales Order Processing](#) Order Enquiry. For more information, refer to the [Sales Order Processing](#) product guide.

Price List (F16)

Use this to display the [Sales Order Processing](#) Price List Enquiry for the customer's price list, entered in the Customer Additional Details file. For more information, refer to the [Sales Order Processing](#) product guide.

Select **Update (F8)** to save any changes and print the Credit Refusal report.

Print Authorised Exchange Credit Summary [14/EQI]

Use this batch [job](#) to print a credit authorisation document for all the [jobs](#) that currently have an exchange status of 14 (Credit Proposed). This is a report of all [jobs](#) that the technician has suggested are worth refurbishing. The Service Exchange user can see the same list by selecting status 14 in the **Maintain Service Exchange task [13/EQI]**.

This report prints the [job](#) number and category, [model](#), and customer details.

Select **Confirm Submit (F8)** to submit the batch [job](#).

Maintain Labour Price List [15/EQI]

Use this [task](#) to add, update and delete labour and travel rate price lists by currency. [Job](#) pricing uses the lists to determine which labour and travel charges to apply.

You record price lists against a hierarchy which [job](#) pricing uses to determine which labour rate list to use.

You can enter an effective date against any price list to allow for future price increases.

Labour Price List Maintenance Window

To display this window, select the Maintain Labour Price List [task](#).

Use this window to enter or select the labour price list you want to maintain or create. The date, price list and currency code identify a set of hourly labour rates to use in pricing.

Fields

Price List Code

Enter a price list.

Alternatively, use the prompt facility to select from the Labour Price List Maintenance pop-up.

To create a price list, enter a code of up to three alphanumeric characters.

Currency Code

Enter the currency for this price list.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Effective Date

Enter or select a date (in DDMMYY format).

Note: *If you do not enter the effective date, all existing price lists for the selected code are displayed on the Labour Price List Maintenance Selection window so that you can select the required list.*

Note: *You must enter an effective date if you are creating a new price list.*

Enter or select a price list and a currency code and a date and then press Enter to display the Labour Price List Maintenance Rates window.

Labour Price List Maintenance Rates Window

To display this window, enter or select a price list and a currency code, and a date and then press Enter on the Labour Price List Maintenance window. Alternatively, select a price list on the Labour Price List Maintenance Selection window.

Use this window to enter the rates you charge for each labour type. The price list, currency and effective date are displayed at the top of the window.

Fields

Service Rate

Enter the hourly labour rate for [jobs](#) carried out on Field Service [job](#) categories.

A Field Service [job category](#) is denoted as having a category type of 01-03.

Workshop Rate

Enter the hourly labour rate for [jobs](#) carried out on a Workshop [job category](#).

A Workshop [job category](#) is denoted as having a category type of 04-08.

Travel Rate

Enter the hourly rate used to calculate the travel charge.

Select **Update (F8)** to save the details and return to the Labour Price List Maintenance window.

Contract Credits Maintenance [16/EQI]

Use this [task](#) to view or amend [contracts](#), invoices or pending invoices. You also use this [task](#) to accept invoices so that you can produce a part credit note or a full credit and re-invoice. You can also discard [contracts](#) altogether from the crediting routine.

Description

The input document is the report produced by the [Contract](#) Credit Selection [task](#).

If there is deferred income, such as in pre-paid [contracts](#) of more than one month, you can specifically enquire on the amount of deferred credit. When you accept the calculated values, you can update the credit. You can credit the original invoice in full and re-invoice the outstanding amount, or credit a proportion of the original invoice.

For pending invoice records (where you have calculated the invoice price but not posted or printed it), you can only use the re-invoice [task](#)

Note: *If you do not want to credit the invoice or pending invoice records, you can remove them from the report of records selected for credit using **Discard (F11)**.*

Implications

Only use the [task](#) to give a full credit against the original invoice and re-issue a new invoice if it does not infringe local tax regulations.

The amount of deferred credit given directly mirrors the amount of deferred revenue posted from the original invoice. If you want to take the credit over a different period from the original posting periods, do this through a journal entry in the [General Ledger](#).

Maintain [Contract](#) Credits automatically removes pending invoices if:

- You [terminate](#) the [contract](#) early using [contract](#) maintenance so that the pending invoices are beyond the new end date
- You select the first invoice selected for credit and action

Note: *You cannot reverse a [contract](#) invoice using the Create Sundry Invoices/Credit Notes [task](#). You can only use that [task](#) to reverse a [job](#) invoice.*

After this [task](#), run the Generate and Print [Contract](#) Invoices [task](#) to print re-invoices and credit notes. Do not run the Print Sundry Invoices/Credit Notes [task](#) for these credits or re-invoices.

Contract Invoice Selection Window

To display this window, select the Maintain [Contract](#) Credits [task](#).

Use this window to select the [contract](#) and invoice for which you want to maintain a credit.

Fields

Contract Number

Enter the [contract](#) number to credit, using seven alphanumeric characters. This is from the [Contract](#) Selection report.

Contract Type

Enter the [contract type](#) for the [contract](#).

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

Contract Date

Enter or select the date associated with the [contract](#).

Invoice Number

Either enter the specific invoice number (in the format I followed by six digits) for the [contract](#) or leave this field blank and complete the [Invoice Period](#) fields.

Currency Rate Code

If the customer requires a credit in a currency other than your base currency, enter the currency rate.

Note: *If you do not have a code set up, use the Currency Rate and Multiply/Divide fields.*

Currency Rate

Enter the rate to convert the value of the credit.

Note: *If you enter a currency rate, you must complete the Multiply/Divide field.*

Multiply/Divide

Enter one of the following:

0 - To multiply the credit value by the rate

1 - To divide the credit value by the rate

Invoice Period From

Enter or select a date (in DDMMYY format).

Use the date printed on the [Contract](#) Credit Selection report.

Invoice Period To

For pending invoices, enter or select date (in DDMMYY format). Use the date printed on the [Contract](#) Credit Selection report.

Note: *You only need to complete the [Invoice Period](#) fields if you have not entered an invoice number.*

Press Enter to display the relevant [Contract](#) Credit Maintenance Prices window.

Contract Credit Maintenance Header Prices Window

To display this window, enter the selection details for a [contract](#) with [contract](#) header pricing and then press Enter on the [Contract](#) Invoice Selection window.

Use this window to enter the credit details for a [contract](#), with [contract](#) header pricing as the basis for pricing and invoicing. You make the amendments at header level. If you use [contract](#) equipment line pricing, you can select each of the machines on the invoice for editing. For further information, refer to the [Contract](#) Credit Maintenance Line Prices Window section.

Fields

Credit Dates - Requested

Enter or select a date on which to effect the value of the credit. Changing the date to the invoice start date gives a full credit for the [invoice period](#). The default is the [Contract](#) End Date on the [contract](#) header.

Credit Dates - Actual

This field displays the requested credit date plus the penalty days.

Penalty

Enter the penalty days, between 1 and 999. This defaults to the value of the [Termination](#) Days field on the [contract type](#).

Equipment Servicing adds the penalty days to the Credit Dates - Requested value.

Note: You cannot take the penalty beyond the end of the [invoice period](#).

Functions

Recalc (F5)

Use this to re-calculate the value of the credit and re-invoice.

Currency (F6)

Use this to override currency details for transactions where currencies are not linked to the Euro.

Update-Credit (F8)

Use this to update any editing and produce a credit against the original invoice. Equipment Servicing writes the original invoice number to the credit note header.

This is not displayed if you are editing a pending invoice.

Note: You must then select the Generate and Print [Contract Invoices task](#) [4/EQI].

Update-Re-invoice (F9)

Use this to update any changes and:

- For an actual invoice, produce a credit for the full amount of the original invoice, and a new invoice for the re-calculated amount due

You must then run the Generate and Print [Contract Invoices task](#).

- For a pending invoice, produce a new pending invoice record for the re-calculated amount of the invoice

You must then run the standard Generate and Print [Contract](#) Invoices [task](#) for the invoice release date to produce the invoice.

Discard (F11)

Use this to reject the credit. Equipment Servicing returns the [contract](#) and its invoice detail to their status prior to [contract](#) credit selection.

Base Value/Prime Value (F14)

Use this to toggle the display between base currency and prime currency.

Contract Enquiry (F16)

Use this to view the details of the [contract](#).

Internal Text (F21)

Use this to access text from [contract](#) maintenance or enquiry.

External Text (F22)

Use this to enter up to three lines of text to print on the credit note.

To update the [contract](#), select either **Update-Credit (F8)** or **Update-Re-Invoice (F9)**.

Override Conversion Parameters Pop-up

To display this pop-up, select **Currency (F6)** on any [contract](#) or pricing window.

Use this pop-up to override the currency conversion rate.

You define IN currencies and the Euro within the [General Ledger](#). The exchange rate between IN currencies, that is currencies defined to the Euro, is fixed and you cannot maintain them.

Rate Code

Enter a pre-defined rate code as set up Maintain Rate Codes [task](#).

Alternatively, use the prompt facility to select from the Select Currency Rate Code pop-up.

Rate

Alternatively, you can enter the new rate code to be used with up to five decimal places.

Multiply or Divide

If this field is used, a value must be entered in the Rate field.

Select one of the following:

Multiply (M) - To multiply the values held in the source currency by the exchange rate to achieve the target currency value

Divide (D) - To divide values held in the source currency by the exchange rate to achieve the target currency value

Note: For Euro conversion, the system holds Euro/target fixed rates.

Note: For guidance on when to select Multiply or Divide in a Euro IN/OUT OUT/IN situation, see the Eurocurrency: Phase 1: Illustration of Conversions section in the Currency chapter of the [General Ledger](#) product guide.

Source to Euro

Note: This field is displayed when either the source or target currency is a currency IN the Euro Zone.

The value of **0** or **1** defaults from the Maintain Euro Currencies [task](#) and decides the calculation rules.

Enter one of the following:

0 - If the currencies will be converted directly

1 - To use a triangulation currency conversion via the Euro currency

Target Currency Value

Enter the target currency value. The system will calculate the rate.

Note: Only the variable part of the rate displays if the currencies are Euro OUT/IN or IN/OUT.

Press Enter to see the rate applied to the converted currencies.

Contract Credit Maintenance Line Prices Window

To display this window, enter the selection details and then press Enter on the [Contract](#) Invoice Selection window.

Use this window to enter the credit details for a [contract](#) where you use [contract](#) equipment line pricing. You can select each machine on the invoice for editing.

If you use [contract](#) header pricing as the basis for pricing and invoicing, refer to the [Contract](#) Credit Maintenance Header Prices Window section.

Fields

Credit Dates - Requested

Enter or select a date on which to effect the value of the credit. Changing the date to the invoice start date gives a full credit for the [invoice period](#). The default is the value of the [Contract](#) End Date on the [contract](#) header less the penalty charges.

Credit Dates - Actual

This field displays the requested credit date plus the penalty days.

Penalty Days

Enter the penalty days, as a value between 1 and 999. This defaults to the value in the [Termination](#) Days field on the [contract type](#).

Equipment Servicing adds the penalty days to the Credit Dates - Requested value.

Note: You cannot take the penalty beyond the end of the [invoice period](#).

Options

Select

Use this to maintain the [model](#) record on the [Contract](#) Detail window.

Functions

Recalc (F5)

Use this to re-calculate the value of the credit and re-invoice.

Update-Credit (F8)

Use this to update the information and produce a credit against the original invoice. Equipment Servicing writes the original invoice number to the credit note header. You must then select the **Generate and Print [Contract Invoices task](#) [4/EQI]**.

Note: If you are editing a pending invoice, this is not displayed.

Update-Re-invoice (F9)

Use this to update any changes and:

- For an actual invoice, produce a credit for the full amount of the original invoice, and a new invoice for the re-calculated amount due

You must then select the Generate and Print [Contract Invoices task](#).

- For a pending invoice, produce a new pending invoice record for the re-calculated amount of the invoice

You must then run the standard Generate and Print [Contract Invoices task](#) for the invoice release date to produce the invoice.

Discard (F11)

Use this to reject the credit. Equipment Servicing returns the [contract](#) and its invoice detail to their status before [contract](#) credit selection.

Base Value/Prime Value (F14)

Use this to toggle the display between base and prime currency.

Contract Enquiry (F16)

Use this to display the details of the [contract](#).

Internal Text (F21)

Use this to access text from [contract](#) maintenance or enquiry.

External Text (F22)

Use this to enter up to three lines of text to print on the credit note.

To update the [contract](#), select either **Update-Credit (F8)** or **Update-Re-Invoice (F9)**.

Contract Detail Window

To display this window, select a piece of equipment on the [Contract](#) Header Line Prices window.

Use this window to view the details and enter the penalty days for the selected piece of equipment. The details displayed include the [contract](#) number, [model](#) number, [serial number](#), and included, requested and actual dates. The invoice amounts are displayed for the service [model](#) and all the equipment on the [contract](#).

Fields**Penalty Days**

Enter the penalty days, between 1 and 999. This defaults to the value from the [Termination](#) Days field on the [contract type](#). Equipment Servicing adds the penalty days to the Credit Dates - Requested value.

Note: *You cannot take the penalty beyond the end of the [invoice period](#).*

Functions**Contract Enquiry (F16)**

Use this to display the [contract](#) enquiry.

Deferred Revenue Enquiry (F18)

Use this to show the impact of the credit on future years.

Select **Update (F8)** to save the information and return to the [Contract](#) Credit Maintenance Line Prices window.

Deferred Revenue Enquiry Window

To display this window, select **Deferred Revenue Enquiry (F18)** on the [Contract](#) Detail window.

Use this window to display the impact of the credit on future years, if you process the credit.

This window displays the deferred credit for each year and the total credit value. The [contract](#) and equipment details are displayed at the top of the window.

Select **Previous (F12)** to return to the previous window.

Generate Estimates [30/EQI]

Use this [task](#) to submit a batch [job](#) that calculates estimated invoices for a particular [branch](#) or for all [branches](#).

The batch [job](#) looks at all metered machines on meterage type [contracts](#); that is, with interim or reconciliation billing cycles, or both. If the [contract](#) billing parameters have an interim or reconciliation [billing term](#) which ends before or on the date specified, and no estimates already exist, this generates estimates for all metered machines on that [contract](#).

The batch [job](#) does not produce a report, but writes the details to file.

Equipment Servicing calculates estimates based on available historical information. If no historical information is available, Equipment Servicing uses either the minimum volume specified on the [contract](#), or the average usage for the [model](#) from the volume segment information.

Estimate Generation Request Window

To display this window, select the Generate Estimates [task](#).

Use this window to select the [branch](#) and date for which you want to create invoices.

Fields

Branch

Enter the [branch](#).

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Leave this field blank to select all [branches](#).

Generate Estimates for Invoice Dates Up To

Enter or select a date. The batch [job](#) generates estimates for all invoices with a date before or equal to this date.

Number of Days after Invoice Date for Return of Meter Cards

Enter the number of days after which customers who prefer to pay the value of an actual reading have to return the reading.

Select **Submit (F8)** to submit a [job](#) to calculate the estimated invoices.

Enter Meter Readings [31/EQI]

Although you can enter meter readings as part of a technician's technical report, this assumes that there is an outstanding [job](#) for the machine.

If a machine has no outstanding [job](#) but still requires a reading, you can use this [task](#) or the Enter Service Readings [task](#) to enter the meter readings.

Meter Reading Entry Selection Window

To display this window, select the Enter Meter Readings [task](#).

Use this window to select the machine for which you want to enter a meter reading.

Fields

Serial Number

Enter the [serial number](#) of the [model](#).

Model

Enter the [model](#) for which you want to enter meter readings.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Enter the [model](#), leave the [serial number](#) blank, and then press Enter to display a list of possible [serial numbers](#) on the Equipment by [Model](#) window.

Press Enter to display the Meter Reading Entry window.

Meter Reading Entry Window

To display this window, enter the selection criteria and then press Enter on the Meter Reading Entry Selection window.

Use this window to enter the actual meter readings. This window displays the customer and [contract](#) details for the [model](#) selected and the estimated readings for each meter.

Fields

Actual

Enter the actual readings for each meter.

Equipment Servicing checks that the reading is higher than the last entry and falls within the tolerance defined in the % Within Estimate Reading Allowed field on the System Parameters Maintenance window.

If Equipment Servicing finds any discrepancy in the entries, the Meter Reading Override pop-up is displayed.

Options

History

Use this to display a list of all historical readings for the meter selected.

Meter Reading Maintenance

Use this to maintain all historical readings for the meter selected and display the Meter Reading Maintenance window.

When you have entered your readings, press Enter.

Meter Reading History

To display this window, select History on the Meter Reading Entry window.

This window displays the machine and [installation](#) details and, for each past reading, the date, type and value for the chosen on each meter.

Select **Previous (F12)** to return to the Meter Reading Entry window.

Meter Reading Maintenance Window

To display this window, select Meter Reading Maintenance against a meter on the Meter Reading Entry window.

Use this window to view all readings for the selected meter and/or amend any reading.

Note: A reading may be amended unless it has an invoiced reading with a later date or a subsequent reading has been overridden. Use the Meter Corrections Entry [task](#) to change invoice readings.

Fields

Select

Select one of the following:

Amend Reading - To select the reading for amendment

Delete Reading - To delete a reading

A confirmation window will be displayed for deletion.

When all required amendments have been made, select **Previous (F12)** to return to the Meter Reading Entry window.

Meter Reading Override Pop-up

To display this pop-up, enter your readings, and then press Enter on the Meter Reading Entry window. If Equipment Servicing finds any discrepancy in the entries, this pop-up is displayed automatically.

Use this pop-up to enter the reason for the discrepancy in the meter readings.

Fields

Reason for Override

Enter the reason the meter reading was overridden.

Alternatively, use the prompt facility to select from the Reason for Meter Override pop-up.

A common reason is a meter rolling over from 99999 to 00000, so that the entered reading is less than the previous one. There is a system-defined reason code for this which triggers special processing.

When you have entered the reason, select **Confirm (F8)**.

Enter Service Readings [32/EQI]

Although you can enter meter readings as part of a technician's technical report, this assumes that there is an outstanding [job](#) for the machine.

If a machine has no outstanding [job](#) but still requires a reading, you can enter meter readings via this [task](#) or the Enter Meter Reading [task](#).

Service Meter Reading Entry Selection Window

To display this window, select the Enter Service Readings [task](#).

Use this window to select the equipment and [contract](#) for which you want to enter meter readings.

Fields

Serial Number

Enter the [serial number](#) of the [model](#).

Model

Enter the [model](#) for which you want to enter meter readings.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Enter the [model](#), leave the [serial number](#) blank, and then press Enter to display a list of possible [serial numbers](#). If the [contract](#) is also blank, a list of possible [contracts](#) is also displayed.

Contract Number

Enter the [contract](#) for which the meter reading is made.

Type

Enter the [contract type](#).

Date

Enter the [contract](#) date.

Enter the selection criteria and then press Enter to display the Service Meter Reading Entry window.

Service Meter Reading Entry Window

To display this window, enter the selection criteria and then press Enter on the Service Meter Reading Entry Selection window.

Use this window to enter the service details, meter reading and reading type. The customer, [model](#) and [contract](#) details are displayed.

Fields**Reading Date**

Enter the date on which the reading was taken. You cannot enter a reading with a date previous to an existing reading, that has been used for invoicing or has been designated as a meter change or meter roll over.

Service Job Number

Enter the [job](#) number.

Type

Enter one of the following:

1 - If this reading is the initial reading

You can only enter one initial reading for a machine, and you cannot enter it if any readings already exist for that machine.

2 - If this reading was taken by a technician during servicing

9 - If this is a final reading

The date must be later than that of the last reading and later than or equal to the machine [termination](#) date.

You can use the prompt facility on this field to select from the Meter Reading Type pop-up.

Reading

Enter the meter reading for each meter. You must enter readings for all meters flagged as mandatory.

Options

History

Use this to display a list of all historical readings for the meter selected.

Meter Reading Maintenance

Use this to maintain all historical readings for the meter selected and display the Service Meter Reading Maintenance window.

Select **Update (F8)** to save your changes.

Service Meter Reading Maintenance Window

To display this window, select Meter Reading Maintenance against a meter on the Service Meter Reading Entry window.

Use this window to view all readings for the selected meter and/or amend any reading.

Note: A reading can be amended unless it has an invoiced reading with a later date or a subsequent reading has been overridden. Use the Meter Corrections function to change invoice readings.

Fields

Select

Select one of the following:

Amend Reading - To select the reading for amendment

Delete Reading - To delete a reading

A confirmation window will be displayed for deletion.

When all required amendments have been made, select **Previous (F12)** to return to Service Meter Reading Entry window.

Credit Assessment Maintenance [40/EQI]

Use this [task](#) to assess the current credit assessment of open [jobs](#) being progressed through the system. Usually these [jobs](#) are for used equipment being returned and the customer wishes a partial credit.

Credit Assessment [jobs](#) are identified by the flag on the [jobs](#) which will be set to **1** for this kind of [job](#). The flag is set during [call](#) logging.

A Credit Assessment [job](#) must go through a number of status changes.

The statuses are:

01 - Customer to Send

- 02 - Collect from Customer
- 13 - Evaluation Required
- 14 - Credit Proposed
- 15 - Suggest Reject Credit
- 20 - [Job](#) Open (Available for Work)
- 50 - Work Complete
- 52 - Available for Stock Receipt
- 96 - Claim Rejected
- 99 - Complete and Documented

All of these statuses can be selected in this [task](#).

Because Credit Assessment [jobs](#) are deemed to be workshop [jobs](#), the initial status set on the [job](#) (and all its lines) will be 01 (Customer to Send) or 02 (Collect from Customer).

When the equipment is booked in, the status is always set to 13 (Evaluation Required). These [jobs](#) should be managed through the **Work Control [task](#) [3/EQS]**. The objective is to produce a list of status 13 [jobs](#) and allow a technician to decide whether the equipment is worth refurbishing, in which case the customer is issued with a credit note and the [job](#) is set to status 14 (Credit Proposed). If the technician decides the equipment is not worth refurbishing, the [job](#) is set to status 15 (Suggest Reject Credit).

While the [job](#) is at status 14 or 15 it cannot be progressed through Work Control. Only the **Maintain Service Exchange [task](#) [13/EQI]** can progress these [jobs](#).

It is the responsibility of the Credit Assessment [manager](#) to progress the [job](#) either to status 20 ([Job](#) Open) or to status 96 (Claim Rejected).

If the [job](#) is changed to status 20, you must decide whether a credit note is to be issued.

If the [job](#) is changed to status 96, a refusal text entry window is displayed, on which you can enter text that can be printed on a refusal letter, if required.

[Jobs](#) at status 20 are now available for work and can be progressed as normal through the system. Once they are at status 50 (using the [Timesheet](#) Entry [task](#) 5/EQS) and have been released through [job](#) completion, the status is automatically set to 52.

This returns control to the Credit Assessment [task](#) where the Credit Assessment [manager](#) can receive the refurbished item into the Inventory system and the status of the [job](#) will be set to 99.

It is always the responsibility of this user to complete the [job](#) either by rejecting it or by releasing the refurbished item to Inventory.

Credit Assessment Maintenance Window

To display this window, select the Credit Assessment [task](#).

Use this window to select the customer or [job](#) for which you want to perform Credit Assessment maintenance.

Fields

Status Required

Enter one of the following to specify which Credit Assessment status you want to display:

01 - Waiting for Equipment

13 - Evaluation Required

14 - Credit Proposed

15 - Suggest Reject Credit

20 - [Job](#) Open

50 - Work Complete

52 - Available for Stock Receipt

96 - Claim Rejected

99 - Complete and Documented

Note: You must enter a value in the Status Required field and one of the following fields:

Account

Enter the customer you require.

Alternatively, use the prompt facility to select from the Customer Scan pop up.

Location

Enter the customer address sequence.

Job Number

Enter the [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Enter the selection criteria and then press Enter to display the Items for Credit window.

Items for Credit Window

To display this window, enter the selection criteria and then press Enter on the Credit Assessment Maintenance window.

Use this window to maintain [jobs](#) eligible for Credit Assessment.

This window displays the selection information and, for each [job](#) found, the current status, reason code, [job](#) number, customer details, price, invoice details and date.

Fields

Credit Accepted By

Enter the name of the person who accepted the credit, using up to 20 alphanumeric characters.

This defaults to the user ID of the operator.

Price

If the credit status is set to 20 ([Job](#) Open), enter the value that is to be issued as an Equipment Servicing credit note.

Options

Release for Work

Use this to update the [job line](#) status to 20 and releases it for work. You can also add invoice text that will be printed on the credit note if a price has been entered. The credit note will be generated automatically but you will need to run the Print Sundry Invoices/Credit Notes [task](#) to print it.

Refuse Credit

Use this to update the [job](#) status to 96. You can also add credit refusal text, if required, which will be printed on a credit refusal letter if you enable it.

Receive into Stock

This only applies to [jobs](#) at status 52 (Available for Stock Receipt) which have been released via [Job Completion \[9/EQS\]](#). Use this to perform a receipt into the default exchange stockroom specified via the Maintain [Branch task](#).

Text

Use this to update credit refusal text.

Details

Use this to maintain the [job](#) structure.

History

Use this to view the history of the [call](#).

Quotation

Use this to enquire on the [quotation](#) for this [job](#), if one exists.

Functions

Sales Order Processing Enquiry (F14)

Use this to display the [Sales Order Processing](#) Order Enquiry. For more information, refer to the [Sales Order Processing](#) product guide.

Price List (F16)

Use this to display the [Sales Order Processing](#) Price List Enquiry for the customer's price list, entered on the Customer Additional Details file. For more information, refer to the [Sales Order Processing](#) product guide.

Select **Update (F8)** to save any changes and print the Credit Refusal report.

Print Proposed Credit Summary [41/EQI]

Use this batch [job](#) to print a credit authorisation document for all the [jobs](#) that currently have a credit assessment status of 14 (Credit Proposed). This is a report of all [jobs](#) that the technician has suggested are worth refurbishing. You can see the same list by selecting status 14 in the **Credit Assessment [task](#) [40/EQI]**.

This report prints the [job](#) number and category, [model](#), and customer details.

Select **Confirm Submit (F8)** to submit the batch [job](#).

Chapter 8 Equipment Servicing Operations

Call Logging [1/EQS]

Use this [task](#) to create new [jobs](#) and maintain existing [jobs](#). You can create [jobs](#) for:

- Pre-booked workshop [jobs](#)
- Field service [jobs](#)
- Service exchange [jobs](#)

To create a [job](#), you need to do the following:

- Identify the [job category](#) or type of [job](#)
- Identify the customer or equipment.
- Enter the [job](#) details.

Note: *The order of the windows, and the windows displayed, depends upon the [job category](#) you select.*

You can confirm warranty meter readings during the [call](#) logging process. If a metered piece of equipment is put on a warranty [job](#), the estimated reading on the [call](#) date is generated and if this exceeds the manufacturer's warranty units, a confirmation window is displayed.

You can confirm or change the estimated reading to confirm whether this is a warranty [job category](#) or not.

Access

You can access the [job](#) you want to create in many ways. You can enter just the [serial number](#), or the [model](#), the customer or customer and account.

Whichever fields you complete on the [Job](#) Creation window, when you press Enter, Equipment Servicing automatically displays lists of missing information so that you can make a selection. So, if you enter just the account number, when you press Enter, a list of addresses is displayed. You then select the machine, etc.

Single mode when customer entered:

- [Job](#) Creation window
- List of outstanding [jobs](#) for selection
- List of equipment
- [Job](#) details
- Template selection

- [Job](#) structure
- Return to [Job](#) Creation window

Multiple mode when customer entered:

- [Job](#) Creation window
- List of outstanding [jobs](#) for selection
- [Job](#) header entry
- Template selection
- [Job](#) structure
- Return to [Job](#) Creation window

Single/multiple mode when equipment entered:

- [Job](#) Creation window
- List of outstanding [jobs](#) for selection
- [Job](#) details
- Template selection
- [Job](#) structure
- Return to [Job](#) Creation window

Job Creation Window

To display this window, select the [Call Logging task](#).

Use this window to define or select the [job](#) you want to create or maintain.

Fields

Job Category

You must enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used when billing the transactions for this [job](#); it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task](#)/ Document type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Serial Number

Enter the [serial number](#) for the machine.

If more than one [job line](#) is found for that machine, they are displayed for selection.

If a [job](#) is already outstanding for the machine, it is displayed, so that you can update it.

Model

Enter a [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: If you only enter a [model](#), a list of all machines of this [model](#) at all [installation sites](#) is displayed.

Account Number/Account Address

Enter the customer account code and address sequence.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If you do not enter an address sequence, a list is displayed, so that you can select the correct address.

Set up a [call](#) for a customer without an account by setting them up as a cash customer. To do this, enter an existing account (reserve a special dummy number for this purpose). Then enter a new address code. You then enter the name and address of the new [installation](#), followed by the equipment installed at the [site](#). You can then log the [job](#) details.

Functions

Save Preferences (F14)

Use this to save the current values on the window, to be restored every time you use the [Call](#) Logging [task](#).

New Customer (F18)

Use this to enter a new address for the selected customer. You can use this and a dummy account number to enter details for cash customers.

Pre-book Jobs (F20)

Use this to display the Pre-book [Jobs](#) Enquiry window.

Enter the required details and then press Enter to display the next window.

New Customer Window

For a new [job](#), a new customer [location](#) can be created for the purpose of taking the [job](#). This will create a new [Accounts Receivable](#) record and a Customer Additional Details record. The next

[location](#) number available will be automatically assigned unless the 999 [site](#) has already been created. In order for this to work, the 000 [site](#) must already exist to be used as a template for the creation.

Use this window to create the customer details.

Fields

Account Name

Enter the customer name.

Currency Customer

Enter one of the following:

0 - If this is not a currency customer

1 - If this is a currency customer

Account Address

Enter the address.

Currency Code

Enter a currency code.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

This defaults from the 000 customer's additional service details, but you can change it.

Curr Rate Code

Enter a currency rate code.

Alternatively, use the prompt facility to select from the Select Currency Rate Code pop-up.

This defaults from the 000 customer's additional service details, but you can change it.

VAT Code

Enter a VAT code.

Alternatively, use the prompt facility to select from the Tax Code Selection pop-up.

This defaults from the 000 customer's additional service details, but you can change it.

Note: Tax codes on the [cover type/job category](#) charge matrix will override this value.

Post Code

Enter the postcode for the customer.

Geographic Code

This defaults to the geocode from the 000 customer's additional service details, but you can change it.

The geocode/territory link determines the engineer or team to be allocated to the [call](#).

Telephone Number

This defaults to the telephone number from the 000 customer's additional service details. You can amend or set up the number and update the service details.

Ext No

You can optionally enter the extension number.

Admin Branch Code

This defaults to the admin [branch](#) of the 000 [site](#) of the account, but you can enter any existing [branch](#).

You can have an admin [branch](#) and a [branch](#) that owns the equipment. However, when you move equipment, it is the admin [branch](#) that can move equipment, possibly from one [branch](#) to another.

Account Contact

Enter a contact name. This will update the contact name in the customer's additional details.

Region

Enter the service region to which the [installation site](#) belongs.

Alternatively, use the prompt facility to select from the Region pop-up.

You set up the code in the Codes/Parameters file under type REGN. The standard reports do not use this field.

Customer Priority

Enter this customer's priority. This is a number from 0 to 4. The highest priority depends on the setting of the Maximum Customer Importance field on the [Company](#) Profile Maintenance Response window.

Equipment Servicing uses the customer priority in the 3-D matrix (with volume segment and machine up or down) to apply percentage reductions to [call](#) response time.

This field displays the customer priority code from the customer's additional details.

Time Zone

Time zones are used when the Service [company](#) has to operate across different time zones. You can specify the time zones as a number of hours' difference ([called](#) the offset time) from the system time and create them in the Inventory Descriptions file under major code TIMZ. Once you have specified the offset time, when system [calls](#) are received the customer date and time are recorded with them, and are used to calculate target times.

You can optionally enter a time zone for the customer.

Alternatively, use the prompt facility to select from the TIMZ Time Zones pop-up.

Statement Code

Enter a valid account to which you send the statements. This will update the [Accounts Receivable](#) statement account.

This defaults from the customer's additional details.

Invoice Address/Sequence

Enter a valid account to which you send the invoices raised on behalf of this [installation address](#).

Enter a valid address sequence to which you send the invoices raised on behalf of this [installation address](#).

These fields default from the account you are setting up as a cash account.

Parts Price List

This field is only displayed if you **checked** the [Sales Order Processing](#) Active field in the Maintain [Company](#) Profile [task](#).

Enter a [Sales Order Processing parts list](#).

Equipment Servicing uses this list to price parts fitted and logged in the technical report.

Parts Disc. List

This field is only displayed if you **checked** the [Sales Order Processing](#) Active field in the Maintain [Company](#) Profile [task](#).

Enter a [Sales Order Processing](#) discount list; this should either have a blank currency or one that matches the customer currency

Equipment Servicing uses this list to calculate discounts due on parts fitted and logged in the technical report.

Select **Update (F8)** to display the [Job](#) Selection window.

Pre-book Jobs Enquiry Window

To display this window, select **Pre-book Jobs (F20)** on the [Call](#) Logging window.

Use this window to view outstanding pre-booked [jobs](#) for the customer entered on the [Job](#) Creation window.

Fields

Job No

This field displays the [job](#) number of all pre-booked [jobs](#) that exist for the account number and [location](#).

Model Number/Serial Number

These fields display details of the equipment on the pre-booked [job](#).

Job Cat

This field displays the [job category](#) of the [job](#).

Flt

This field displays the main reporting code on the [job](#), if one has been entered.

Date/Time

These fields display the date and time at which the pre-booked [job](#) was created.

Select **Continue (F8)** to display the [Job](#) Selection window.

Job Selection Window

To display this window, enter the details for a new [job](#) on the [Job](#) Creation window and then press Enter, if active [jobs](#) for this selection already exist.

Note: *This window is only displayed if active [jobs](#) for this selection already exist.*

Use this window to select an existing [job](#) for maintenance or create a new [job](#).

Fields

Account Number

These fields display the account number, [location](#) and name as entered on the [Job](#) Creation window or the account number of the equipment entered on the [Job](#) Creation window.

Job No

This field displays the [job](#) number of any active [job lines](#) found for the equipment or account entered in the [Job](#) Creation window. Active [jobs](#) have a status below 90.

Model Number

This field displays the [model](#) number on the [job](#).

Serial Number

This field displays the [serial number](#) on the [job](#).

Job Cat

This field displays the [job category](#) on the [job](#).

Reporting Codes

This field displays the first 2 levels of the reporting code hierarchy on the [job](#), if codes have been entered.

Date/Time

These fields display the date and time at which the [job](#) was created.

Cvr Typ

This field displays the [contract cover type](#) associated with the equipment on the [job](#) on the day on which it was created.

Customer Order Number

This field displays the customer order number entered when the [job](#) was created.

Description

This field displays the description of the [job](#) as entered against the [job](#) header.

Status

This field displays the status of the [job](#) header.

Options**Select**

Use this to display the [Job Line](#) Details window.

Functions**New Job (F18)**

Use this to display the next phase of [job](#) creation.

Note: *If you are in single mode, the List of Equipment window is displayed; if you are in multiple mode, the [Job](#) Header Entry window is displayed. The mode is determined by the [job category](#) entered on the initial [Job](#) Creation window.*

Code type selection window

India only

Use this to select whether either a SAC or HSN is applicable for this [job](#)

The [job category](#) is entered on the [job](#) (a mandatory field) to determine whether a restricted list of valid SAC or HSN codes can be added to the [job](#). Only one or other can be added. If an HSN is attached then all service and parts booked on the [job](#) will be taxed and reported using the override HSN code not the HSN code associated with the individual parts.

The HSN/SAC code entry window is displayed once all screen fields have been validated. Before it is displayed the [Job category](#) is tested against the [Job Category](#)/SAC and HSN restrictions table and, if no record is found, then the SAC window is displayed; alternatively, if restrictions have been defined then:

If all records found are of one type then the SAC window is displayed

If records are found with mixed type then the user must choose the type before the entry window is displayed.

Once a type has been established then the SAC window is displayed.

If there is only one record then the value is displayed and the field protected.

If there are multiple records but one has a default then the default is displayed but a prompt allows the other codes associated with the [job category](#) to be selected.

If there are multiple records but no default then the entry field is blank and the prompt will show the associated codes for the [job category](#).

Fields

Chose HSN Code

Use this checkbox as follows:

Unchecked – HSN is not applicable

Checked – HSN is applicable

Chose SAC Code

Use this checkbox as follows:

Unchecked – SAC is not applicable

Checked – SAC is applicable

Select either HSN or SAC and press ENTER

Indian Details - Job Creation

India only

Use this to select the applicable HSN or SAC; it may be left blank

Fields

SAC code/HSN code

Enter the applicable SAC or HSN as applicable

Press ENTER and Update (F8) to display the [Job](#) Header Entry window

Job Header Entry Window

To display this window, enter the details for a new [job](#) on the [Job](#) Creation window and then press Enter or select **New Job (F18)** on the [Job](#) Selection window.

Note: *This window is only displayed if the [job category](#) allows multiple mode entry.*

Use this window to enter the customer reference details and to include equipment on the current [job](#) number by keying in a [model](#) and [serial number](#) or selecting from a list of existing equipment at the customer [site](#).

If the [model](#) and [serial number](#) entered do not exist, the piece of equipment will be recorded on the [installation](#) database for the [installation site](#).

Fields

Customer Ord No

Enter the customer order number. This must obey the customer order mask rules, if one exists for the customer.

Job Contact

Enter the name of the person placing the [call](#).

Alternatively, use the prompt facility to select from the Contact Details pop-up.

Collection

This field is only displayed for workshop [job](#) categories. It defaults to the [branch](#) collection method in the [Branch](#) file.

Select one of the following:

01 - Customer to send

02 - Collect from customer

You can use the prompt facility on this field to select from the Collection Method pop-up.

Note: *If it is specified in the system parameters that you can have multiple machines on a [call](#), you can enter many [job lines](#).*

Enter Equipment for Repair

Model

To add a new [model](#) to the list, enter the [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial

Enter the [serial number](#), if known.

Main Area

Enter the first two levels of the fault reported by the customer. However, these codes cannot be faults but [tasks](#) that have to be performed on the [job](#). An example would be the codes associated with an [installation job](#), which are not fault codes.

You can use the prompt facility on these fields to select from the relevant pop-up.

Note: *The headings of these fields are soft-coded and can be configured in the Codes/Parameters file, under type FLTS.*

Customer Order Number

Enter a customer order number if different from the customer order number in the header. This must obey the customer order mask rules, if one exists for the customer.

Customer Collection Required (CCO)

Enter one of the following:

0 (default) - If the equipment will be returned to the customer

1 - If the customer will collect the equipment

Qty

Enter the number of pieces of equipment. If you enter a [serial number](#), you must set this to **1**.

Procedure

Enter the procedure code for this [job](#), if required. If entered, this value will be used to subset the templates applicable to this [job](#).

You can use the prompt facility on this field to select from the Procedure pop-up.

Estimate

Enter one of the following:

0 - If you do not require an estimate

1 - If the customer requested an estimate

2 - If the customer requested a quote

3 - If you require an estimate

4 - If you require a quote

Credit Ass

There are two fields required when credit assessment is requested.

Enter one of the following:

0 - If you do not want a credit assessment

1 - If you require credit assessment

If you enter **1**, you must enter a credit request reason in the Reason field. You must also set the Estimate/Quote Req field to **0**.

Note: *Credit Assessment and Estimate/Quote are mutually exclusive.*

Date of Purchase

Enter the date on which the equipment was purchased.

Note: *To save the new [model](#) information and display the details in the list, press Enter.*

Options

Add Detail

Use this to amend the [job](#) details for this piece of equipment, using the [Job Line](#) Details window. This is the default selection.

Inst. Details

Use this to amend the [installation](#) information, using the equipment Detail Maintenance window.

Edit Line

Use this to select the line for maintenance by writing it to the input-capable line near the top of the window.

Delete Line

Use this to delete this [job line](#) and its associated [job](#) header.

You must enter a reason. If the equipment was added as part of this [job](#) creation, Equipment Servicing also deletes the equipment record.

Accessories

Use this to add accessories to the [job line](#), using the Accessories/Conditions window.

Job Structure

Use this to maintain the [job](#) structure if the [job](#) has been created. This will not be a valid selection if the [job](#) was created as a [quotation](#). Even though it is visible on the window, there is no [job](#) structure to maintain.

The [Job](#) Structure Maintenance window is displayed.

Functions**Equipment Selection (F16)**

Use this to display the [Installation](#) Equipment Maintenance window.

Select Add Detail against a piece of equipment to display the [Job Line](#) Details window.

Job Line Details Window

To display this window, select Add Detail against a piece of equipment on the [Job](#) Header Entry window or select a [job line](#) in the [Job](#) Selection window.

Use this window to enter the detailed information for the selected [job line](#).

Below is an example of the [Job Line](#) Details window running in workshop mode.

Below is an example of the [Job Line](#) Details window running in Field Service mode.

All fields that can be displayed in either mode are described below.

Fields**Model Number**

If required, enter the new [model](#) number of the piece of equipment.

Serial Number

If required, enter the new [serial number](#) for the piece of equipment.

Note: You can only change the [model](#) and [serial number](#) for a workshop [job](#) with the status of Pre-book or Book-in. Once the equipment has been booked in, these fields cannot be changed.

Job Desc

This field displays the description of the [job](#). In addition mode, it defaults to the [job category](#) description but can be overtyped.

Cust Order No

Enter a customer order number. This must obey the customer order mask rules, if one exists for the customer.

Job - Booked

This field is only displayed for workshop [jobs](#). Enter the date and time at which you booked the [job](#) with the workshop. This defaults to the date and time at which you created the workshop [job](#).

Job - Received

Enter the date and time at which you received the [job](#) in to the workshop or created a field service [job](#).

Response

This consists of two fields. Enter the collection response time in the first field and the [job](#) response time in the second field. The response time format is hh:mm.

Equipment Servicing uses the response time to calculate the target time to start work on the [call](#). The default response time is from the response time hierarchy. This is special [serial number](#) data, [contract](#) line (machine), [contract](#) header, [contract type](#), and finally [branch](#) default time in escalation control maintenance. The 3-D matrix percentages can affect the time unless the response time is set up as a special [serial number](#).

Target

This is the booked or received date and time plus response time, with allowance for the [Branch](#) Service Window and Calendar files.

Note: A [job](#) created on a Friday evening at 4:00 pm with a 4-hour response time would have a target date and time of 11:00 am on the following Monday, assuming that the [branch](#) service window is 8:00 to 5:00 and Saturday and Sunday are non-working days.

The next field's heading and use is conditioned by whether it is a workshop [job](#) or field service [job](#).

Req. Comp (Required Completion)

Enter or select the date by which you must complete the workshop [job](#).

or

Appointment

Enter or select the date by which you must have started the field service [job](#).

Note: In both cases above, if you enter a date it will become the target date and time of the [Job Received](#) set of dates and times.

Credit Assess

Enter one of the following:

0 - If you do not want a credit assessment

1 - If you require credit assessment

If you enter **1**, you must enter a credit request reason in the Reason field. You must also set the Estimate/Quote Required field to **0**.

Reason

If you set the Credit Assessment field to **1**, enter the reason why you want a credit check.

Alternatively, use the prompt facility to select from the Credit Assess. Reason Code pop-up.

Job Cat

This field defaults from the [Job](#) Creation window. You can optionally enter a new [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Note: the [job category](#) cannot be changed once a single transaction has been recorded against the [job](#), for example, a single part booked or [timesheet](#) entry made

Note: If the [job category](#) can be modified, it can only be changed into a [job category](#) with same classification. Workshop [jobs](#) cannot be changed into field service [jobs](#) and vice versa.

Estimate/Quote Required

Enter one of the following:

0 - If you do not require an estimate

3 - If the customer requested an estimate

4 - If the customer requested a quote

You can use the prompt facility on this field to select from the Estimate Request Type pop-up.

Note: This flag is protected for Parts Tax Only [job](#) categories

Note: The Credit Assess and Estimate/Quote Required fields are mutually exclusive.

Procedure

Enter the procedure code for this [job](#), if required. If entered, this value will be used to subset the templates applicable to this [job](#).

You can use the prompt facility on this field to select from the Procedure pop-up.

Main Area

Enter the first two levels of the fault reported by the customer. These codes cannot be faults but [tasks](#) that have to be performed on the [job](#). An example would be the codes associated with an [installation job](#) not a breakdown [job](#).

You can use the prompt facility on this field to select from the relevant pop-up.

Note: The headings of these fields are soft-coded and can be configured in the Codes/Parameters file, under type FLTS.

Sub Area

The second level code cannot be entered independently of the first level code and therefore has no prompt facility. You can select it via the pop-up for the Main Area field.

Collection Req

This field is only displayed for workshop [job](#) categories. It defaults to the [branch](#) collection method in the [Branch](#) file.

Enter one of the following values:

01 - Customer to send

02 - Collect from customer

Alternatively, use the prompt facility to select from the Collection Method pop-up.

Machine Up

Use this checkbox as follows:

Unchecked - If the machine is down or not working

Checked - If the machine is up or still working

This can alter the response hours if a record is entered in the 3-D Matrix table.

Emergency

Use this checkbox as follows:

Unchecked - If this is not an emergency

Checked - If this is an emergency

This field is visible in the Work Control [Job](#) Listing windows to alert the user to possible emergency situations.

Contact

Enter the name of the person placing the [call](#).

Alternatively, use the prompt facility to select from the Contact Details pop-up.

This field defaults from the [Job](#) Header window.

Location

If this is a book-in [job](#), enter the physical [location](#) of the machine in the workshop.

This field is not displayed if this is a workshop pre-book [job](#).

If this is a field service [job](#), enter the physical [location](#) of the equipment at the customer [site](#). This will default from the equipment [installation](#) table.

Physical Cond

This field is only displayed for workshop [jobs](#) and is for information only. Enter the physical condition code of the equipment as it arrives at the workshop and its description will be retrieved. You can overwrite the description if required.

Team

Enter the team for this [job](#).

Alternatively, use the prompt facility to select from the Team Description pop-up.

The default is the team allocated by Equipment Servicing based on technician, territory, including geocode and [field service group](#), and the [installation site's](#) geocode. To set this up, use the Maintain FSG/Territory/Team [task](#). If no match is found, Equipment Servicing sets the allocation to *DF, the default team.

Technician

Select **Assign Technician (F2)** to allocate a technician manually to the [job line](#). You can specify in the Codes/Parameters file, under type VLDN, whether the technician field is mandatory.

Assign Technician (F2) is only available in Addition mode. Once a [job](#) is created, you must use the Work Control [task](#) to manage technicians on the [job](#).

Job Duration

Enter the length of time needed to complete the [job](#), in hh.mm format. This will default from the average breakdown field from the [model](#) table.

Functions**Assign Technician (F2)**

Use this to assign a technician to this [job](#) if the team is not *DF (default team). This function is only available in Addition mode.

Contract (F6)

Use this to access the [contract](#) details and [cover type/job category](#) charge matrix.

Finance (F7)

Use this to enter finance details for the whole [job](#).

Messages/Text (F10)

Use this to send a machine message.

Change Account (F11)

Use this to change the invoice account for this [job](#).

History Enquiry (F13)

Use this to view the [Call](#) History window.

Accessories (F14)

Use this to access the Accessories/Condition window.

Complete Call (F15)

Use this to complete the [job](#) if, during [call](#) creation, you can close the [job](#) before work starts on it and it therefore has no transactions. You have to enter the time elapsed since the [job](#) began, and enter a reason code for completing the [job](#).

You set these codes up in the Codes/Parameters file [task](#), under type CORA (typical examples would be no action necessary, or advice and guidance given).

This function is only displayed if the [job's](#) status is 20 (Open) for field service [jobs](#) or 01 or 02 for workshop [jobs](#).

Configuration (F16)

Use this to enquire upon the configuration of the equipment on the [job](#). This function is described in full as part of the Maintain [Installation](#) Details section in the Customer and Equipment Database chapter of this product guide.

Audit (F17)

Use this to view the [Job](#) Audit Enquiry pop-up.

Equipment Details (F18)

Use this to display the Equipment Detail Maintenance window. This function is described in full as part of the Maintain [Installation](#) Details section in the Customer and Equipment Database chapter of this product guide.

Print Documents (F19)

Use this to print standard documents.

Documents available are:

- Print discrepancies
- Print acknowledgements
- Print [job](#) card

Use this function to print documents at any point in the life of a [job](#).

More Details (F21)

Use this to enter a number of additional [job](#)-related fields.

Name/Address (F23)

Use this to maintain the name and [site](#) address.

Select **Update (F8)** to save the entered information and update the system-maintained fields.

Warranty Meter Reading Entry Window

To display this window, select **Update (F8)** for a warranty [job](#) on the [Job Line](#) Details window.

Use this window to confirm or change the actual reading on a metered piece of equipment.

Fields**Actual Reading**

Enter the actual meter reading.

Estimated Actual

Enter the estimated reading.

Functions**Accept Reading/Estimate (F8)**

Use this to accept the entered readings.

Reading Not Accepted (F10)

Use this if you do not want to accept the entered readings.

Meter History (F13)

Use this to display a list of all historical readings for the meter selected.

Meter Reading Maintenance (F15)

Use this to maintain all historical readings for the meter selected and display the Warranty Meter Reading Maintenance window.

Select **Accept Reading/Estimate (F8)** to accept the entered readings.

Warranty Meter Reading Maintenance Window

To display this window, select **Meter Reading Maintenance (F15)** on the Warranty Meter Reading Entry window.

Use this window to view all readings for the selected meter and/or amend any reading.

Note: *A reading may be amended unless it has an invoiced reading with a later date or a subsequent reading has been overridden. Use the Meter Corrections Entry [task](#) to change invoice readings.*

Fields**Select**

Select one of the following:

Amend Reading - To select the reading for amendment

Delete Reading - To delete a reading

A confirmation window will be displayed for deletion.

When all required amendments have been made, select **Previous (F12)** to return to Warranty Meter Reading Entry window.

Selection of Technicians in a Team Pop-up

To display this window, select **Assign Technician (F2)** on the [Job Line](#) Details window.

Use this pop-up to view technicians that can be assigned to the [job](#). Only technicians that are part of the team on the [Job Line](#) Details window will be listed, together with their skill set.

The [model](#) hierarchy definition of the equipment on the [job](#) and the [job category](#) will be listed at the top of this pop-up. Use this information and the technician's skill set to select a technician for assignment to the [job](#).

Fields

Team

This field displays the team from the [Job Line](#) Details window.

Division

This field displays the [division](#) of the [model](#) on the [job](#).

Model Group

This field displays the [model](#) group of the [model](#) on the [job](#).

Subgroup

This field displays the [model](#) sub group of the [model](#) on the [job](#).

Job Category

This field displays the [job category](#) of the [job](#).

Tech

This field displays the technician code of a technician that belongs to the team displayed above. All technicians assigned to a team via the Maintain Technician [task](#) will be listed here unless they are flagged as absent on the Technician Master file.

Name

This field displays the technician name retrieved from the Technician Master file.

Br

This field displays the [branch](#) of the technician retrieved from the Technician Master file.

Model No.

This field defaults from the Skill Matrix file record for the technician. If there is a value, this specific [model](#) has been listed as part of the technician skills. No value indicates that the technician can service all [models](#) of the [division/model](#) group/[model](#) sub group listed below.

Div

This field defaults from the Skill Matrix file record for the technician. There will always be a specific [division](#) code listed here.

Group

This field defaults from the Skill Matrix file record for the technician. A default value of ALL indicates that the technician can service all [model](#) groups for the [division](#). A specific [model](#) group indicates that the technician can service this [model](#) group.

Sub-Grp

This field defaults from the Skill Matrix file record for the technician. A default value of ALL indicates that the technician can service all [model](#) sub-groups for the [model](#) group. A specific [model](#) sub-group indicates that the technician can service this [model](#) sub-group.

Job Cat

This field defaults from the Skill Matrix file record for the technician. A default value of ALL indicates that the technician can service all [job](#) categories. A specific [job category](#) indicates that the technician can service this [job category](#) on the associated [model](#) hierarchy.

Functions**Previous (F12)**

Use this leave the pop-up without assigning a technician.

Select a technician to assign to the [job line](#).

Contract Window

To display this window, select **Contract (F6)** on the [Job Line](#) Details window.

Use this window to view the [contract](#) cover for the machine. This is shown as an enquiry version of the [Cover Type/Job Category](#) Matrix window for the [cover type](#) of the equipment, currency of the account and the [job category](#) of the [job](#).

The explanation of the contents of this window can be found in the [Cover Type/Job Category](#) Enquiry section in the Enquiries chapter of this product guide.

Select **Previous (F12)** to return to the [Job Line](#) Details window.

Job Details Maintenance Pop-up

To display this pop-up, select **Finance (F7)** on the [Job Line](#) Details window.

Use this pop-up to enter the finance details for the [job](#).

Fields**Selling Price**

Use the selling price to enter a Fixed Price for the entire [job](#). The currency that the price will be invoiced in is displayed next to the field. If you enter the selling price, the Variation Entry Details window is displayed, so you can record the change as a variation.

All transactions booked against this [job](#) will be priced at zero.

Note: Selling price cannot be entered for a Part Tax Only [job category job](#).

GL Account Code

If an account number is entered, it must be a valid account number in the [General Ledger](#) and can be used in the [AFI](#) interface as a default account for this [job](#).

Project Manager

Enter the person who is responsible for the financial aspects of the [job](#).

Alternatively, use the prompt facility to select from the Project [Manager](#) pop-up.

Transfer Method

Enter the [transfer method](#). For details on how each [transfer method](#) works, refer to the following table.

Transfer Method	Initial Posting	Transfer To	Transfer Process Req'd	Release Process Req'd	Close Process Req'd
0	P&L	n/a	n/a	n/a	n/a
1	WIP	P&L	YES	NO	NO
2	WIP	P&L	YES	YES	NO
3	WIP	P&L	YES	YES	YES
4	WIP	FA	YES	NO	NO
5	WIP	FA	YES	YES	NO
6	WIP	FA	YES	YES	YES
7	WIP	n/a	n/a	n/a	n/a
8	WIP	P&L/FA	YES	n/a	Optional

Key:

[WIP](#): Work in Progress; P&L: Profit and Loss; FA: Fixed Assets

Initial Posting - The place in [General Ledger](#) to which you want to post [costs](#) when initially posted to the GL

Transferred To - Where [costs](#) are transferred to when released from [WIP](#)

Transfer Process Required - Whether you need to initiate the transfer via an [activity](#) or activities

Release Process Required - **Yes** means the transfer process only transfers those [costs](#) defined using the Release [Job task](#). **No** means the transfer process processes all [costs](#) still in [WIP](#).

Close Process Required - **Yes** means you can only run the Release [Job task](#) for closed [jobs](#). **No** means you do not need to close the [job](#) first.

Note: To get [costs](#) with a [transfer method](#) of 7 out of [WIP](#), you must change the [transfer method](#).

Asset Number

Enter an asset number to create or amend within Fixed Assets when you transfer the [cost](#) for this [job](#) detail.

Asset Group

Enter an existing asset group.

Alternatively, use the prompt facility to select from the Select Asset group pop-up.

Depreciation Rate

Enter the depreciation rate. This overrides, for this [job](#) detail and asset group, the default depreciation rate recorded against depreciation methods not equal to 004.

Depreciation Life

Enter the depreciation life. This overrides, for this [job](#) detail and asset group, the default depreciation life recorded against depreciation methods not equal to 004.

Multiple Assets

Enter one of the following:

0 - To capitalise all [costs](#) for a [job](#) detail to one asset

1 - To create multiple assets

Use this for serial-controlled Inventory items only. The asset name is truncated to 11 characters (left justified), and the software automatically generates sequential numbering for the last 4 characters. No embedded blanks are allowed.

For example:

The asset number ABCDEFGHIJKLMNO is truncated to ABCDEFGHIJK and the numbers created are ABCDEFGHIJK0001 and ABCDEFGHIJK0002

If the asset number is ABCD, the resulting numbers are ABCD0001 and ABCD0002

Note: At the time of capitalisation, the software does not capitalise any non-serial-controlled Inventory item [costs](#), it writes them to the [General Ledger](#) write-off account (specified in the [company](#) profile).

Note: If you change the [transfer method](#) from 4, 5 or 6 to a value other than 4, 5 or 6, the fixed asset data is cleared for the [job](#) detail.

Cost to Complete

Enter a [cost](#) to complete code.

Alternatively, use the prompt facility to select from the [Cost](#) to Complete Code pop-up.

Cost to Complete Methodologies**Labour**

Enter the default method for labour in [cost](#) to complete:

1 - Finish [budget](#) on time

- 2 - Continue at same level of efficiency
- 3 - Complete at standard rate
- 4 - Input the degree of inefficiency to apply to rest of [job](#)
- 5 - Input the degree of efficiency
- 6 - Enter hours to complete

You can use the prompt facility on this field to select from the Select Labour Methodology pop-up.

Material

Enter the default method for materials in [cost](#) to complete:

- 1- Based on commitments
- 2 - Based on original estimate
- 3 - Enter revised estimate

You can use the prompt facility on this field to select from the Select Material Methodology pop-up.

Other Direct

Enter the default method for other direct [costs](#) in [cost](#) to complete:

- 1 - Based on commitments
- 2 - Based on original estimate
- 3 - Enter revised estimate

You can use the prompt facility on this field to select from the Select Other Direct Methodology pop-up.

Functions

Stage Payments (F13)

Use this to set up [stage payments](#) for any [job](#) level defined as a fixed price [job](#). Use [stage payments](#) to generate invoices automatically when you reach specified stages of the project. The [Stage Payments](#) Maintenance window is displayed. For more details, refer to the [Stage Payments](#) Section of this product guide.

Budgets (F14)

Use this to maintain [budgets](#). The [Budget/Forecast](#) Maintenance Selection window is displayed. For more details, refer to the [Budgets](#) section of this product guide.

PO Entry (F15)

Use this to enter a purchase order for the [job line](#). The PO Header Entry window will be displayed with the [job line](#) filled in and protected.

PO Enquiry (F16)

Use this to display the PO Enquiry window if you have previously created a purchase order for this [job line](#).

Activities (F19)

Use this to enter activities for this [job](#) detail. The [Job](#) Detail [Activity](#) Maintenance window is displayed. For more details, refer to the [Job](#) Detail Activities section of this product guide.

Maintain Costs (F20)

Use this to attach an item to a [job](#) detail, detach it from the [job](#) detail, or amend the item. If any items already exist, a selection list is displayed. The Production [Cost](#) Maintenance Detail window is displayed.

Press Enter to validate your changes and then select **Update (F8)** to save the details. The [Job Line](#) Details window is re-displayed.

Job line Details - Print Documents

Use this option to print a [job](#) card for the [job](#) number displayed

To display this window, select **Print Documents (F19)** on the [Job Line](#) Details window.

Fields**Print (untitled)**

Enter **1** to select to print the [job](#) card. The Print [job](#) card detail selection window is displayed.

Print job card detail selection window

To display this window, select the **Print [Job](#) card function** from [Job line](#) Details - **Print Documents**.

Fields**Job**

Enter **1** to select to print the whole [job](#) card.

or

Sub job Range

Enter a valid [sub-job](#) range to display a list of valid [sub-jobs](#) for the [job](#)

Alternately use the prompt facility to display a list of valid [sub-jobs](#) for the [job](#).

or

Sub job

Enter valid [sub-jobs](#)

Alternately use the prompt facility to display a list of valid [sub-jobs](#) for the [job](#).

or

Instruction codes

Enter valid instruction codes

Alternately use the prompt facility to display a list of valid instruction codes for the [job](#).

Functions

Prompt (F4)

Use this to [call](#) the [Job](#) sub [job](#) / instruction code search.

Submit (F8)

Use this to submit the [Job](#) card print with the selections entered

Job sub-job / Instruction code Pop-up

To display this window, use the prompt function for either [Sub-jobs](#) or Instruction codes on the Print [Job](#) card detail window.

Fields

Select

Use this to select a [Sub-job](#).

Job card print

This print is [called](#) from the [Job](#) card print submission.

There is no change to the content of this print. However whereas the [job](#) card print was for a single [job](#) listing all its sub [jobs](#) and [tasks](#) for that sub [job](#), you can now subset the print in one of a number of ways:

- a [job](#) number
- a range of sub [jobs](#)
- a list of sub [jobs](#) (maximum 10)
- a list of Instruction codes (Maximum 10)

Job Template List Window

To display this window, select **Update (F8)** on the [Job Line](#) Details window.

Alternatively, press Enter on the [Job](#) Header Entry window.

Use this window to select a template to be used in the generation of the [job](#). This window is only displayed if the [job category](#) on the [job](#) does not allow automatic template generation or if an appropriate table template is found.

If no template is retrieved, a default structure with a blank [sub-job](#) and [task](#) equal to 001 will be generated.

This window displays a list of templates appropriate for the [model/job category/procedure](#) on the [job](#). Use the Maintain [Job](#) Template to create and maintain templates.

Options

Select

Use this to select a template for [job](#) creations.

Enquiry

Use this to display the [Job](#) Template Enquiry window, showing the structure of the template.

Select a template to display the [Job](#) Header Entry window.

Job Structure Maintenance Window

To display this window, select a template on the [Job](#) Template List window.

Alternatively, select **Job Structure** against a line on the [Job](#) Header Entry window.

Use this window to select a template to be used in the generation of the [job](#). This window is only displayed if the [job category](#) on the [job](#) does NOT allow automatic template generation.

This window allows the maintenance of the [job](#) structure generated by the template generator.

Fields

Heading Fields

'TEMPLATE TEXT EXISTS**' message**

This message is displayed if text has been copied to the [job](#) from the template.

The [job](#)-related information displayed in the header belongs to the prime [job](#) where the prime [job](#) has a blank [sub-job](#) and 000 [task](#).

Total Hours

This field displays the total of actual hours for all [job lines](#) in the structure.

Table

Select

Enter one of the following:

- 1 - To display the Add [Sub-job](#) pop-up to add a new [sub-job](#) to the existing [job](#) structure
- 2 - To display the Add [Task](#) pop-up to add a new [task](#) to an existing [sub-job](#)
- 3 - To display the Maintain Details pop-up to maintain either a [sub-job](#) or a [task](#) depending on the [job](#) structure line selected
- 4 - To display the Delete Details pop-up in order to delete either a [sub-job](#) or [task](#) depending on the [job](#) structure line selected
- 5 - To display the [Job](#) Parts Demand Maintenance window, on which parts can be added to or deleted from a [job](#) structure line
- 6 - Use this to display the Direct Transactions Entry window in order to enter expenses on the [job](#).
- 7 - Use this to display the Sub-[Contract](#) Details pop-up in order to add or update subcontract details
- 8 - To display the Order Summary window if a subcontract purchase order has been created
- 9 - To display the [Job Line](#) Details window
- 10 - To display meter readings associated with a [task](#) or [sub-job](#) if any are available
- 11 - To display the [Call](#) Administration window
- 12 - To add [stage payments](#) to the [job](#)
This is only available for fixed price [jobs](#).
- 13 - To display the [Budget](#)/Forecast Maintenance window
- 14 - To display the [Job](#) Detail [Activity](#) Maintenance window, on which you can add activities to the [sub-job](#) or [task](#)
- 16 - To display the [Job](#) Completion Enquiry [Job](#) Summary window
- 37 - To display the [Timesheet](#) Entry window

Sub Job

A value in this field indicates the start of a new [sub-job](#).

Task

This field displays the [task](#) number. It will be blank for a [sub-job](#).

Job Cat/Description

These fields display the [job category](#) and description of this [job line](#). This need not be the same as the prime [job category](#).

St

This field displays the status of the [job line](#). The prime [job](#) will reflect the lowest status of any line in the [job](#) structure. As each [job line](#) changes status, the prime [job](#) is updated to be the lowest status.

Estimated Hours

This field displays the estimated hours of the [job line](#), which are usually derived from the template but can be entered manually if a new [sub-job/task](#) is added or amended for existing [job lines](#).

Actual Hours

This field displays the actual labour and travel hours recorded against the [job line](#). It is only updated once the [Timesheet](#) Reconciliation and Post [Timesheet tasks](#) have been run.

Part

A value other than **0** in this field indicates that this is a parts line and that labour and subcontract [tasks](#) cannot be performed against this line.

Possible values are:

- 1 - If a [parts list](#) exists but no [Sales Order Processing](#) order has been placed
- 2 - If a [Sales Order Processing](#) order has been placed
- 3 - If the [Sales Order Processing](#) order has been despatched and the [costs](#) have been added to the [job](#)

These flags are also mirrored by the status of the line. You can select [job lines](#) with the following statuses. This allows the user to select work where action is required:

- 06 - [Sales Order Processing](#) order creation required
- 16 - Awaiting [Sales Order Processing](#) order despatch
- 50 - The [Sales Order Processing](#) order has been despatched

S/C

A value other than **0** in this field indicates that this is a subcontract line and that labour and parts ordering [tasks](#) cannot be performed against this line.

Possible values are:

- 1 - If subcontract skeleton details exist but the purchase order has not been placed
- 2 - If the purchase order has been placed and released
- 3 - If the purchase order has been received or matched and the [costs](#) have been added to the [job](#)

The trigger point is determined by a flag in the [company](#) profile to indicate if the purchase order [costs](#) can be confirmed on the [job](#) and the [job line](#) status set to 50 at Goods Receiving or Invoice Matching.

These flags are also mirrored by the status of the line. You can select [job lines](#) with the following statuses. This will allow you to select work where action is required:

06 - Purchase Order creation required

16 - Awaiting PO receipt/invoice match

50 - The PO has been received/matched

Exp

You can enter any number of expenses against a [job line](#). A value of **3** indicates that at least one expense has been entered onto the [job line](#).

Functions

Msg./Text (F10)

Use this to display the Scheduled/Appointment [Calls](#) window. This function is not displayed if you are displaying [jobs](#) for the [branch](#).

All Parts (F14)

Use this to display the All Parts on a [Job](#) Enquiry window.

Cost View (F16)

Use this to view the same [job](#) structure from a financial viewpoint.

Resource View (F18)

Use this to view the same [job](#) structure from a resource management viewpoint.

Report (F22)

Use this to enter reporting codes and equipment-related details for the entire [job](#).

Select **Previous (F12)** to return to the previous window.

Add Sub-job Pop-up

To display this pop-up, enter 1 against a line and then press Enter on the [Job](#) Structure Maintenance window.

Use this pop-up to create a new [sub-job](#) for the [job](#).

Fields

Sub-job

Enter the [sub-job](#) code.

You must select this field from a pre-configured list if one has been created via the Maintain Codes/Parameters [task](#). If no list exists, you can enter any character value.

Note: The code will determine the position of the [sub-job](#) in the [job](#) structure. AAA will be before BBB even if it was entered after it.

Description

Enter the description of the [sub-job](#). If the code was pre-configured, this field will default to the description from the Codes/Parameters file, but you can overtype it.

Job Category/Description

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

The [job category](#) of the prime [job line](#) determines whether the [job category](#) at lower levels can be different from the [job category](#) on the prime.

If the [job category](#) can be different, this would allow other [tasks](#) such as re-[installation](#) or education to be added to a breakdown [job](#).

The [job category](#) will determine the chargeability of this [sub-job](#) and the team assigned to do the work.

See the Maintain [Job Category](#) section in the Equipment Servicing Operations Maintenance chapter of this product guide for an explanation of the importance of the [job category](#) and its control flags.

Target Start Date/Time

The target start date and time are calculated from the previous [job](#) structure's start date and time plus its duration, taking into account the service window and working days from the daily calendar.

Estimated Labour Hours

Enter a value to indicate how many hours this [task](#) should take. Only enter a value if this is a labour [task](#). Do not enter values if this [job](#) structure line is to be used to order parts or subcontract services.

Total Labour Hours

This field has a value at [sub-job](#) level and is the sum of all the labour [tasks](#) associated with this [sub-job](#).

Chargeable

This field displays **1** if a single chargeable element is set to **1** in the Maintain [Cover Type/Job Category task](#). Chargeable elements are labour, travel, mileage, expenses and up to 4 categories on Inventory items. See the Maintain [Cover Type/Job Category](#) section in the Equipment Servicing Operations Maintenance chapter of this product guide for further explanation.

S/C Details

If subcontract details have been set up against this [job line](#), either from a template or by being manually entered, **1** is displayed here.

Predecessor Sub-job/Task

Use this field to indicate if a particular [sub-job](#) or [task](#) is a predecessor [task](#) in the [job](#) structure and should have a target date and time less than the target date and time of the [sub-job/task](#) being maintained.

Model Number

Enter a valid [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Use this field to indicate that this [job line](#) is for [tasks](#) on a different piece of equipment from the equipment on the prime [job line](#). A [model](#) can only be entered if the [job category](#) flag that allows the [model](#) to be different is **checked**.

Serial Number

Enter a valid [serial number](#) that already exists at the customer [site](#).

Alternatively, use the prompt facility to select from the [Installation](#) Equipment Maintenance window. This will only list existing equipment at the [site](#).

Use this field to indicate that this [job line](#) is for [tasks](#) on a different piece of equipment from the equipment on the prime [job line](#). A [serial number](#) can only be entered if the [job category](#) flag that allows the [model](#) to be different is **checked**.

Elapsed Days

Enter the elapsed days.

Use this field to force the target start date and time of this [job line](#) to be this number of elapsed days after the previous [job line](#). This allows delay to be introduced into the [job](#) timeline between one [job](#) and another.

Instruction Code

Enter a valid instruction code.

Alternatively, use the prompt facility to select from the Select Instruction Code pop-up.

Use this field attach an instruction code to the [job line](#). The instruction code has attached to it a number of work instructions. This allows complex [job](#) instructions to be added to the [job](#) without increasing the number of reportable [tasks](#) to the [job](#).

Functions**Text (F14)**

Use this to enter [job](#) story text.

Update & Re-calculate Target Date (F16)

Use this to re-calculate target and date and times for all subsequent [job lines](#). This may be required if the estimated hours or elapsed days of this [job line](#) are amended.

Select **Update (F8)** to save the details and return to the previous window.

Add Task Pop-up

To display this pop-up, enter 2 against a line and then press Enter on the [Job](#) Structure Maintenance window.

Use this window to create a new [task](#) for a [sub-job](#).

Fields

New Task Details

Task

Enter the [task](#) number.

You must select this field from a pre-configured list if one has been created using the Maintain Codes/Parameters [task](#). If no list exists, you can enter any numeric value.

Note: The [task](#) number will determine the position of the [task](#) in the [job](#) structure. 001 will be before 002 even if it was entered after it.

Description

Enter the description of the [task](#).

If the code was pre-configured, the description from the Codes/Parameters file will be displayed but you can overwrite it.

Job Category/Description

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

The [job category](#) template determines whether the [job category](#) at lower levels can be different from the [job category](#) of the template.

If the [job category](#) can be different, this would allow other [tasks](#) such as re-[installation](#) or education to be added to a breakdown template.

The [job category](#) will determine the chargeability of this [task](#) and the team assigned to do the work.

See the Maintain [Job Category](#) section in the Equipment Servicing Operations Maintenance chapter of this product guide for an explanation of the importance of the [job category](#) and its control fields.

Target Start Date/Time

The target start date and time are calculated from the previous [job](#) structure's start date and time plus its duration, taking into account the service window and working days from the daily calendar.

Estimated Labour Hours

Enter a value to indicate how many hours this [task](#) should take. Only enter a value if this is a labour [task](#). Do not enter values if this [job](#) structure line is to be used to order parts or subcontract services.

Chargeable

This field displays **1** if a single chargeable element is set to **1** in the Maintain [Cover Type/Job Category task](#). Chargeable elements are labour, travel, mileage, expenses and up to 4 categories on Inventory items. See the Maintain [Cover Type/Job Category](#) section in the Equipment Servicing Operations Maintenance chapter of this product guide for further explanation.

S/C Details

If subcontract details have been set up against this [job line](#), either from a template or by being manually entered, **1** is displayed in this field.

Predecessor Sub-job/Task

Use this field to indicate if a particular [sub-job](#) or [task](#) is a predecessor [task](#) in the [job](#) structure and should have a target date and time less than the target date and time of the [sub-job](#) or [task](#) being maintained.

Model Number

Enter a valid [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Use this field to indicate that this [job line](#) is for [tasks](#) on a different piece of equipment from the equipment on the prime [job line](#). A [model](#) can only be entered if the [job category](#) flag that allows the [model](#) to be different is **checked**.

Serial Number

Enter a valid [serial number](#) that already exists at the customer [site](#).

Alternatively, use the prompt facility to select from the [Installation](#) Equipment Maintenance window. This will only list existing equipment at the [site](#).

Use this field to indicate that this [job line](#) is for [tasks](#) on a different piece of equipment from the equipment on the prime [job line](#). A [serial number](#) can only be entered if the [job category](#) flag that allows the [model](#) to be different is **checked**.

Elapsed Days

Enter the elapsed days.

Use this field to force the target start date and time of this [job line](#) to be this number of elapsed days after the previous [job line](#). This allows delay to be entered into the timeline of the [job](#). For instance, a 3-day delay could be introduced after subcontract [tasks](#) to compensate for any transport risks.

Instruction Code

Enter a valid instruction code.

Alternatively, use the prompt facility to select from the Select Instruction Code pop-up.

Use this field attach an instruction code to the [job line](#). The instruction code has attached to it a number of work instructions. This allows complex [job](#) instructions to be added to the [job](#) without increasing the number of reportable [tasks](#) to the [job](#).

Functions

Text (F14)

Use this to enter [job](#) story text.

Update & Re-calculate Target Date (F16)

Use this to re-calculate target and date and times for all subsequent [job lines](#). This may be required if the estimated hours or elapsed days of this [job line](#) are amended.

Select **Update (F8)** to update the details and return to the previous window.

Maintain Details Pop-up

To display this window, enter 3 against a line and then press Enter on the [Job](#) Structure Maintenance window.

Use this window to maintain either a [sub-job](#) or a [task](#).

Fields

The fields on this window are the same as those on the Add [Sub-job](#) and Add [Task](#) pop-ups.

Note: *Only certain fields can be amended. If a change is required to a protected field, the [sub-job](#) or [task](#) must be deleted and re-added.*

Functions

The functions are the same as those on the Add [Sub-job](#) and Add [Task](#) pop-ups.

Select **Update (F8)** to save the entered information and update the system-maintained fields.

Delete Details Pop-up

To display this pop-up, enter 4 against a line and then press Enter on the [Job](#) Structure Maintenance window.

Use this window to delete a [sub-job](#) or [task](#).

Functions

Confirm Delete (F11)

Use this to confirm the deletion of a [job line](#).

If this is a [sub-job](#), you will delete the [sub-job](#) and all of its [tasks](#). If this is a [task](#), you will delete the [task](#) only.

A [sub-job](#) or [task](#) can only be deleted if no bookings have been made against it. If this is a [sub-job](#), a search is made for bookings against its [tasks](#).

The system searches for the following to determine if bookings have been made:

- [Sales Order Processing](#) order placed
- Purchase order placed
- [Timesheet](#) entries made
- Expenses booked
- Direct transactions made

Select **Confirm Delete (F11)** to delete the [sub-job](#) or [task](#).

Job Parts Demand Maintenance Window

To display this window, enter 5 against a line and then press Enter on the [Job](#) Structure Maintenance window.

Note: *The same part number and stockroom may not be entered more than once on an order.*

Use this window to record parts required on a [job line](#) or to place the demand order.

Fields

Heading Fields

Destination Message

A message is only displayed if the demand order has not yet been placed. The message shows the address to which the parts will be shipped. To change the destination address, select **Name/Address Override (F18)**.

The hierarchy of addresses used by the system is:

- Override address at [sub-job](#) or [task](#) level
- Override address at prime [job](#) level
- For a field service [job](#) with a technician assigned, use technician's address as override
- For a field service [job](#) with no technician assigned, use customer's address as override
- [Branch](#) address

Tot. Price

This field displays the price of the items visible on the window at the moment using either standard pricing or advanced pricing as determined by the [Sales Order Processing company](#) profile.

However, the [cover type/job category](#) charge matrix will determine if the price of the item returned from the pricing routines is added to the total price. The item may be free of charge under the [terms](#) of the [contract](#) cover.

Order Number

This will display the [Sales Order Processing](#) order number if it has been created by selecting **Create Order (F9)** function. Once an order number is visible, all maintenance on this window is prevented. [Sales Order Processing](#) Order Amend must be used to alter the order if necessary.

Once the order has been despatched, additional items used on the [job line](#) must be booked using the Parts Reporting [task](#) in Equipment Servicing.

The literal "(Text)" after the order number indicates that order header text has been attached to this order and when the order is created it will be written to the Order Text file.

Table

Part Number

This field displays a valid Inventory item number.

Kit

An asterisk (*) in this field indicates that the item on this parts line is defined as a kit item in the Inventory Item Master file.

Description

This field displays the Inventory description.

Req. Quantity

This field displays the quantity required. This is either the value entered on this window or the value derived from the [job](#) template, if a template was used to generate this parts requirement.

Avl. Quantity

This field displays the quantity currently available for this item in the identified stockroom. This is for information only. This does not affect any processing on this window.

S

This field displays the status of this [Sales Order Processing](#) order line within the order fulfilment system.

Sk

This field displays the stockroom you have entered or the stockroom derived from the [job](#) template and from which stock is to be allocated. This stockroom can be superseded by the Equipment Servicing Hunt Group processing if this has been set up via the Maintain Hunt Groups system utilities [task](#).

Date Req

This field defaults to the target start date of the [job line](#). The stock must be there to allow the [sub-job](#) or [task](#) to commence. The date can be overridden, but cannot be manually entered as earlier than the current date.

Text

An asterisk (*) in this field indicates that order line text has been attached to this parts line and when the order is created it will be written to the Order Text file.

Input Fields

Part Number

Enter a valid Inventory item number.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Quantity

Enter the required quantity for the item. This must be a positive value.

UoM

Enter a valid unit of measure for the item.

Alternatively, use the prompt facility to select from the Purchase/Issue Unit Selection pop-up.

Stockroom

Enter a valid stockroom for the item.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

This should be the stockroom from which you want the item to be allocated. This field defaults to the stockroom associated with the technician, if one is assigned to the [job line](#), or to the [branch](#) stockroom if no technician is assigned.

Delivery Date

This field defaults to the target start date of the [job line](#) or the current date if the target date and time is earlier than the current date. You can enter or select any valid date that is greater than or equal to the current date.

Value

Enter the total value of the [quotation](#) line.

If this field is left blank, the value will be calculated from using the normal EQ pricing rules.

FOC

This denotes that the Parts are Free of Charge (FOC). They will be priced or valued at 0.

Options

Select

Use this to select this line for amendment. The values will be moved down into the input fields to allow amendment.

Note: *This option is not available once an order has been placed.*

Text

Use this to enter text for the [job line](#). This will be written as order line text when the [Sales Order Processing](#) order is placed.

Note: *This option is not available once an order has been placed.*

Delete

Use this to delete the parts requirement line.

Note: *This option is not available once an order has been placed.*

Item Enquiry

Use this to display the All Stockrooms for an Item Enquiry window.

Item/Stockroom Enquiry

Use this to display the Inventory Item/Stockroom Enquiry window, using the stockroom on the line.

Whole Order Enquiry

Use this to view the [Sales Order Processing](#) order as it progresses through the [Sales Order Processing](#) system.

Note: *This option is only available once an order has been placed.*

Stock Search

Use this to search through the hunt group associated with the stockroom currently on the parts line. Use this only if the available stock in the starting stockroom is 0. If no hunt group is set up, no search will be performed. The search will stop at the first stockroom in the hunt group that has available stock of this item and will return this stockroom and the available quantity to the parts line.

Note: *This option is not available once an order has been placed.*

Note: *This is only a suggestion as to the stockroom from which stock will be allocated. No allocation takes place. Therefore between the time at which this available stock value is displayed and the time at which the order is placed, the stock situation may have changed.*

PO Enquiry

Use this to view the outstanding purchase orders for the item on the parts line. This will [call](#) the standard Orders by Item enquiry.

Workshop Search

Use this to see if there are any outstanding Service Exchange [jobs](#) for the item on the parts line. Service Exchange [jobs](#) are raised to refurbish incoming items and return them to stock. Therefore, if the item is due in for refurbishment, there may be no need to raise a purchase order if there is no current stock.

Note: *This is only a view of outstanding Service Exchange [jobs](#). There is no way to allocate the incoming items to this parts line.*

Functions**Stock Search (F6)**

Use this to search through all the parts line on the window and perform the hunt group processing associated with the stockroom currently on each parts line. Use this only if the available stock in the starting stockroom is 0. If no hunt group is set up, no search will be performed. The search will stop at the first stockroom in the hunt group that has available stock of this item and will return this stockroom and the available quantity to the parts line.

Note: *This function is not available once an order has been placed.*

Create Order (F9)

Use this to create a [Sales Order Processing](#) order. You cannot create an order under the following conditions:

- The customer on the order is not defined on the [Sales Order Processing](#) Customer Additional Details.
- There is no order reference, if it is mandatory in [Sales Order Processing](#)

A part of the Order creation process the **Job Template Update Request pop-up** will only be displayed after a user has selected to perform supersession from the [Job](#) parts demand maintenance function and if the part being replaced exists on the template used to create the [job](#).

To display this pop-up select a replacement part from the **Part Supersession window**.

Once the order has been created, the order number will be displayed in the header. A warning message will be displayed if the order has been suspended. Once the order has been created, you can access [Sales Order Processing](#) Suspended Order Release and [Sales Order Processing](#) Order Amend before leaving this window.

Note: *This function is not available once an order has been placed.*

More Details (F13)

Use this to display the [Sales Order Processing](#) order line number and the price on this parts line.

Order Header Text (F14)

Use this to set up order header text that will be attached to the [Sales Order Processing](#) order when it is created.

Note: *This function is not available once an order has been placed.*

Authorised Parts (F15)

Use this to list all parts that can be ordered for the [model](#) number on the [job line](#).

Note: *If one item is set up in the authorised [parts list](#), only this part can be ordered. If no parts are set up on the list, all items can be ordered.*

All Parts View (F16)

Use this view all parts currently booked to ALL lines in the [job](#) structure. This will allow you to determine quickly if a part is already being used on another part of the [job](#).

Parts Bookings (F17)

Use this to display the Parts Bookings window.

Name/Address Override (F18)

Use this to set up an override name and address for the order. Parts will be delivered to this address. It will be written as the override name and address on the [Sales Order Processing](#) order.

Note: *This function is not available once an order has been placed.*

Additional Functions Available When the Order Has Been Placed

Additional Order Overrides (F19)

Use this to maintain the additional order overrides using the [Sales Order Processing](#) Additional Order Overrides pop-up.

Susp. Order Release (F20)

Use this to release this order, if it is suspended, using the [Sales Order Processing](#) Suspended Order Release [task](#).

Order Amend (F22)

Use this to amend this order using the [Sales Order Processing](#) Order Amend [task](#).

Select **Previous (F12)** to return to the [Job](#) Structure Maintenance window.

Job Template Update Request Pop-up

To display this pop-up, select a replacement part from the Part Supersession window.

The [Job](#) Template Update Request pop-up is only displayed after a user has selected to perform supersession from the [Job](#) parts demand maintenance function and if the part being replaced exists on the template used to create the [job](#).

Functions**Leave (F13)**

Use this to exit without template update

Update (F8)

Use this to update the template used to create the [job](#) where all occurrences of the original part number will be replaced by the new part number.

Note: *There is no Previous (F12) processing, therefore you cannot return to the Part Supersession window.*

Select **Update (F8)** to return to the [Job](#) Parts Demand maintenance.

Sub-Contract Details Pop-up

To display this pop-up, enter 7 against a line and then press Enter on the [Job](#) Structure Maintenance window.

Use this pop-up to add or amend subcontract details. Use these details to create a purchase order when ready. Once a purchase order has been raised, this pop-up cannot be updated. Use Purchase Order Amend to change details on the purchase order.

The purchase orders created have a purchase order classification of 5 (Non-stock Order).

Fields

Supplier Number

Enter a valid supplier number.

Alternatively, use the prompt facility to select from the Third Party Technician Selection pop-up.

The supplier must exist on the Purchasing Supplier Master file and be associated with a third party technician. Use the Maintain Technician [task](#) to set up this relationship.

Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used; it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task](#)/ Document type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Supplier Address

Enter a valid supplier address sequence.

The supplier address must exist on the Purchasing Supplier Master file and be associated with a third party technician. Use the Maintain Technician [task](#) to set up this relationship.

This field will be completed automatically if you use the prompt facility on the Supplier Number field.

S/C Reference

Use this to enter a subcontract reference or instruction. This is passed through to the Supplier Item Ref fields on the purchase order.

Receiving address

India only

Enter a Receiving Address that is maintained to represent all possible receiving [sites/locations](#) within the [company](#). These are selected when processing the sub-[contracting](#) order

Quantity

Enter the quantity.

Cost

Enter the [cost](#) agreed with the supplier.

Mark Up %

Use this to enter or amend the mark up percentage that will be applied to the [cost](#) to give the charge that will be made to the end customer.

Note: Although a charge value is displayed, it will only be invoiced to the end customer if the [cover type/job category](#) charge matrix indicates that expenses are chargeable.

Note: mark up percentage is automatically retrieved using the [job category](#) on the [job line](#) and the default [expense type](#) for the [job line](#). As this is a subcontract [task](#), the default expenses type is defined in the [company](#) profile. The mark up percentage is defined on the [Expense Type](#) Maintenance window within the Maintain [Job Category task](#).

Charge

Enter the charge that will be invoiced to the end customer if the [job line](#) is chargeable. Either accept the calculated value of ([Cost](#) x Mark Up %) or enter the required value manually.

Currency Code

This defaults to the currency of the supplier code and address code entered.

VAT Code

Enter the VAT code required for this subcontract service. This must be a valid VAT code.

Alternatively, use the prompt facility to select from the Select VAT Code pop-up.

Purchasing Officer

Enter the purchasing officer who will be responsible for the management of this purchase order within the Purchase Management system.

Alternatively, use the prompt facility to select from the Select Purchasing Officer pop-up.

Functions

Update & Create PO (F9)

Use this to update the details and create the purchase order. The system will create the order and take you to the Order Line Entry window with the values from the Equipment Servicing window passed through into the purchase order input fields.

You can then enter or amend any details and update the order. The GL code on the purchase order line defaults from the Equipment Servicing [company](#) profile. It is the holding account for [Accounts Payable costs](#).

Note: Only one active purchase order can be associated with a [job line](#).

Text (F14)

Use this to enter text that will be transferred and created as purchase order header text when the purchase order is created.

Select **Update (F8)** to save the entered information return to the [Job](#) Structure Maintenance window.

Order Line Entry Window

To display this window, select **Update & Create PO (F9)** on the Subcontract Details pop-up.

Use this window to add or amend the subcontract purchase order line. If **Cancel (F11)** is selected on this window, the purchase order will not be created and you will be returned to the Subcontract Details pop-up. If you press Enter and then **Update (F8)**, the purchase order number will be returned and will be visible on the Subcontract Details Enquiry pop-up.

Fields

Supplier Item Ref

This field defaults to the value of the S/C Reference field on the Subcontract Details pop-up. This is mandatory for non-stocked lines.

GL Code

This field defaults to the GL account from the Equipment Servicing [company](#) profile. This is the account to which the goods value is posted in Invoice Matching. This is a mandatory field, if the [General Ledger](#) is active.

When you press Enter to accept the order line, the Select Account Code pop-up will display the default account extension code. You can accept this code or amend it.

Quantity/UoM

These fields default to the quantity and unit of measure entered on the Subcontract Details pop-up.

SR

The field defaults to the default stockroom for the service [branch](#).

Price/UoM

The price defaults to the price entered on the Subcontract Details pop-up.

You can also enter the unit of measure to which the price applies, if this is different from the quantity unit of measure.

VAT Code

This field defaults to the VAT code entered on the Subcontract Details pop-up.

The VAT Code must be a valid code on the [General Ledger](#) VAT Codes file.

Disc%

You can optionally enter up to two discounts to be applied to the price for this item.

Due Date

Enter or select the date on which this order line is due to be delivered. This defaults to the target date from the Equipment Servicing [job line](#).

If the due date is changed, the associated expected receipt date is also changed.

Job Number

This field defaults from the concatenated Equipment Servicing [Job](#) number [sub-job](#) and [task](#) and cannot be changed.

Department

This field defaults from the default subcontract [expense type](#) in the Equipment Servicing [company](#) profile and cannot be changed.

Options**Amend**

Use this to amend line details.

Schedule Details

Use this to display the Schedule Line Details window (only for scheduled or blanket orders).

Order Line Text

Use this to display the Order Line Text pop-up.

Landed Costs

Use this to display the Landed [Costs](#) window.

Functions**Cancel Order (F11)**

Use this to use this to cancel the order.

Press Enter to display the Select Account Code pop-up.

Press Enter again to accept this order line. You can add further order lines to the order.

Select **Update (F8)** to create the order and return to the [Job](#) Structure Maintenance window.

Subcontract Details Enquiry Pop-up

To display this pop-up, enter 7 against a line on the [Job](#) Structure Maintenance window if a purchase order has already been created.

Fields**Supplier Number**

This field displays the supplier account number.

Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used; it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task](#)/ Document type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Supplier Address

This field displays the supplier address sequence.

S/C Reference

This field displays the subcontract reference.

Receiving address

India only

This displays the receiving address used for purchase orders created

Quantity

This field displays the quantity of the non-stock items required.

Cost

This field displays the [cost](#) agreed with the supplier.

Mark Up %

This field displays the mark up percentage that will be applied to the [cost](#) to give the charge that will be made to the end customer.

Note: *Although a charge value is displayed, it will only be invoiced to the end customer if the [cover type/job category](#) charge matrix indicates that expenses are chargeable.*

Charge

This field displays the charge that will be invoiced to the end customer if the [job line](#) is chargeable.

Currency Code

This field displays the currency of the supplier code/address entered.

VAT Code

This field displays the VAT code required for this subcontract service. This must be a valid VAT code.

Purchasing Officer

This field displays the purchasing officer who will be responsible for the management of this purchase order within the Purchase Management system.

Purchase Order

This field displays the number of the purchase order raised to satisfy this subcontract [job line](#).

Functions

Text (F14)

Use this to enter text that will be printed on the purchase order.

Select **Previous (F12)** to return to the [Job](#) Structure Maintenance window.

Call Administration Window

To display this window, enter 11 against a line on the [Job](#) Structure Maintenance window or select Track/Rpt against a [timesheet](#) line on the [Timesheet](#) Add/Amend window or select **Report Codes (F21)** in the [Job](#) Completion [task](#).

Use this window to enter [job](#) reporting codes and update key equipment related data.

Fields

Main Area

Use this field to enter the first reporting code of a 4-level hierarchy.

Alternatively, use the prompt facility to select from the appropriate pop-up.

Note: *The heading of this field (and those of the three following fields) is soft-coded and may not be [called](#) Main Area in your application. Use the Maintain Codes/Parameters [task](#), type FLTS, to change the field headings.*

The hierarchy is [model](#)-dependent

This field is mandatory if the Reporting Codes Mandatory field is **checked** in the Maintain [Job Category](#) [task](#).

Sub Area

Use this field to enter the second reporting code of a 4-level hierarchy.

Alternatively, use the prompt facility to select from the appropriate pop-up.

This field is mandatory if the Reporting Codes Mandatory field is **checked** in the Maintain [Job Category](#) [task](#).

Problem

Use this field to enter the third reporting code of a 4-level hierarchy.

Alternatively, use the prompt facility to select from the appropriate pop-up.

Symptom

Use this field to enter the fourth reporting code of a 4-level hierarchy.

Alternatively, use the prompt facility to select from the appropriate pop-up.

Customer Order Number

Use this field to enter a customer order number at reporting time. This will be used if the technician asks for the customer order number before starting the [task](#).

This field obeys the validation rules as described in the [Job Line](#) Details Window section.

Functions

Serial Maint. (F9)

Use this to change the [serial number](#) on the [job line](#).

Model Maint. (F14)

Use this to change the [model/serial number](#) on the [job line](#).

Machine (F16)

Use this to access a list of equipment at the customer [site](#) for maintenance. This window is described in full in the Maintain [Installation](#) Details section in the Equipment Servicing Operations Maintenance chapter of this product guide.

Name/Address Maint. (F18)

Use this to change name and address details for the [job line](#).

Job Meter Readings (F20)

Use this to display the Meter Reading Entry window.

Job Text (F21)

Use this to enter [job line](#) text.

Invoice Text (F22)

Use this to enter invoice text.

Select **Update (F8)** to save the entered information return to the [Job](#) Structure Maintenance window.

Serial Number Maintenance Window

To display this window, select **Serial Maint. (F19)** on the [Call](#) Administration window.

Use this window to change or correct the [serial number](#) on the [job](#). You cannot change to a [serial number](#) which already exists on the Equipment file: to do this use **Model Maint. (F14)**.

Fields**Serial**

Enter a new [serial number](#). This is to correct a [serial number](#) or insert one where none previously existed. You can enter individual [serial numbers](#) in line with the quantity of equipment shown.

Note: You must run the Day End Routines [task](#) to make the change of [serial number](#) effective.

History

Enter **1** against the [serial number](#) that is to retain all the previous [job](#) history. If there is more than one [serial number](#), you must enter **1** against one of the displayed [serial numbers](#).

Press Enter to save the information and then select **Previous (F12)** to return to the [Call](#) Administration window.

Model Maintenance Window

To display this window, select **Model Maint. (F14)** on the [Call Administration](#) window.

Use this window to change a [model](#) and [serial number](#) for a machine on the [site](#). The machines and [serial numbers](#) listed are from the installed equipment.

Options

Select

Use this to select the machine to which the [job](#) record must now be moved.

Note: You can use **Amend Machine (F14)** to add a new machine to the [site's](#) installed equipment records, and to amend the [job](#) record.

Functions

Amend Machine (F14)

Use this to add a new [model](#) and [serial number](#) and amend the [job](#) record.

Select **Update (F8)** to update the record. If you have amended a [model](#), this amends the [job](#) record and sets up a new installed equipment record.

All Parts on a Job Enquiry Window

To display this window, select **All Parts (F14)** on the [Job Structure Maintenance](#) window.

This window displays a list of all parts on all parts of the [job](#) structure in [job](#) structure sequence.

Functions

More Details (F13)

Use this to display the [Sales Order Processing](#) order number and [Sales Order Processing](#) order line number for each parts number.

Part Number View (F14)

Use this to display the [parts list](#) in part number sequence. This allows you to toggle between the parts number view and the [job](#) structure view.

Select **Previous (F12)** to return to the [Job](#) Structure Maintenance window.

Cost View Window

To display this window, select **Cost View (F16)** on the [Job Structure Maintenance](#) window.

Use this window to view the current [costs](#)/charges for the [job](#) at [job](#) header level and at [job line](#) level.

Fields

Totals (Left-hand Side)**Budget Cost**

This field displays the total [budget cost](#) of the entire [job](#).

[Budget costs](#) can come from a number of sources:

- [Quotation](#)
- Entered manually using the Maintain [Budget task](#)
- Generated from the template in the absence of a quote

Budget Revenue

This field displays the total [budget](#) revenue of the entire [job](#).

[Budget](#) revenue can only come from a [quotation](#).

Budget Margin %

This field displays the percentage margin of the [budget](#). It is calculated as:

$((\text{total } \text{budget revenue} - \text{total } \text{budget cost}) / \text{total } \text{budget cost}) * 100$

Totals (Right-hand Side)**Commitments**

This field displays the total of labour, inventory and purchasing commitments for the entire [job](#).

Labour commitments - All [timesheet](#) entries not yet reconciled and posted

Inventory commitments - All [Sales Order Processing](#) orders created but not yet despatched

Purchasing commitments - All purchase orders released but not yet received or matched

Note: *The timing of the conversion from purchasing commitment to [cost](#) either at receipt or invoice matching is dependent on the Convert Commitment to [Cost](#) at PO Receipt or Invoice Match flag in the Equipment Servicing [company](#) profile.*

Actual Cost

This field displays the total of actual labour, inventory and purchasing [costs](#) for the entire [job](#).

Labour [costs](#) - All [timesheet](#) entries that have been reconciled and posted plus expenses plus direct transactions

Expenses [costs](#) - All expenses whether associated with [timesheet](#) entries or not

Direct transaction [costs](#) - All direct transactions whether associated with [timesheet](#) entries or not

Inventory [costs](#) - All [Sales Order Processing](#) order lines despatched

Purchasing [costs](#) - All purchase orders lines received or matched

Note: *The timing of the conversion from purchasing commitment to [cost](#) either at receipt or invoice matching is dependent on the Convert Commitment to [Cost](#) at PO Receipt or Invoice Match flag in the Equipment Servicing [company](#) profile.*

Invoiced Revenue

This field displays the total of all invoice transactions for the entire [job](#).

Actual Margin %

This is calculated as follows:

$((\text{total invoiced revenue} - \text{total actual } [\text{cost}](#)) / \text{total actual } [\text{cost}](#)) * 100$

Potential Revenue

This field displays the total of all the actual charges on transactions. This will include invoiced revenue.

Potential Margin %

This field displays the potential percentage profit margin, based on the potential revenue.

Table**Budget**

This field displays the [budget cost](#) of this [job line](#).

[Job line budget costs](#) can come from a number of sources:

- [Quotation](#)
- Entered manually using the Maintain [Budget task](#)
- Generated from the template in the absence of a quote

Commitments

This field displays the outstanding commitments for the [job line](#).

Labour commitments - All [timesheet](#) entries not yet reconciled and posted

Inventory commitments - All [Sales Order Processing](#) orders created but not yet despatched

Purchasing commitments - All purchase orders released but not yet received or matched

Note: *The timing of the conversion from purchasing commitment to [cost](#) either at receipt or invoice matching is dependent on the Convert Commitment to [Cost](#) at PO Receipt or Invoice Match flag in the Equipment Servicing [company](#) profile.*

Actual

This field displays the total actual [costs](#) for this line:

For labour lines (those that are not parts or subcontract [job lines](#)), this could be reconciled and posted [timesheets](#) plus any expenses plus any direct transactions.

For parts lines, this is the [cost](#) of despatched parts plus any expenses plus any direct transactions.

For subcontract lines, this is the purchase order [costs](#) plus any expenses plus any direct transactions.

Margin %

The margin percentage is calculated differently depending on a flag on the [company](#) profile.

Note: Margin calculations by [cost](#) or revenue. If margin is to be calculated by [cost](#), the calculation is as follows: $((\text{total potential revenue} - \text{total actual } \text{cost}) / \text{total actual } \text{cost}) * 100$

If margin is to be calculated by revenue, the calculation is as follows: $((\text{total potential revenue} - \text{total actual } \text{cost}) / \text{total actual revenue}) * 100$

Charge

This field displays the potential revenue for [job line](#). This is what the customer will be charged if the charge is not manually altered during [Job](#) Completion or Pending Invoice Maintenance.

Options**Select**

Use this to display the Equipment Servicing Enquiry Financial Details window.

Transactions

Use this to display the [Job](#) Completion Enquiry [Job](#) Value Summary window.

Functions**Structure View (F14)**

Use this to view the same [job](#) structure from an overall project viewpoint.

Resource View (F18)

Use this to view the same [job](#) structure from a resource management viewpoint.

Select **Previous (F12)** or **Structure View (F14)** to return to the [Job](#) Structure Maintenance window.

Equipment Servicing Enquiry Financial Details Window

To display this window, select a [job line](#) on the [Cost](#) View window.

Use this window to view financial information about the [job](#). This is described in more detail in the [Job](#) History Enquiry section of this document.

This window displays the customer, [job](#) type, price type, status and income currency for the selected [job line](#).

For each [cost](#) and income, rolled-up and this-level values are displayed.

Note: Use Page Up and Page Down to display all the [cost](#) and income fields.

Functions**Commitments (F14)**

Use this to display the commitments. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Invoices (F15)

Use this to display the details of all invoices on the Equipment Servicing Enquiry Invoices window.

Price Variances (F16)

Use this to display all the price variances on the Equipment Servicing Enquiry Price Variances window.

Stage Payments (F17)

Use this to display all the [stage payment](#) details on the Equipment Servicing Enquiry [Stage Payments](#) window.

Cost Breakdown This Level (F18)

Use this to show a summarised breakdown of [costs](#) for each [expense type](#) on the [Cost Breakdown Summary](#) window.

Cost Breakdown Indented (F19)

Use this to display a more detailed enquiry on transaction details on the Indented [Cost Breakdown Enquiry](#) window.

Alternative Budgets (F21)

Use this to show the finance details on this window with a different [budget](#). The [Budget Selection](#) pop-up is displayed for you to select the [budget](#) you want to display.

Select **Previous (F12)** to return to the [Cost](#) View window.

Inventory Commitments (Sales Order Processing Parts) Window

To display this window, select Inventory on the Commitment Enquiry Selection pop-up, which is displayed when you select **Commitments (F14)** on any window in this [task](#) on which it is available.

Use this window to view the inventory commitments. The information displayed on this window includes:

- Basic customer and [job](#) details
- Commitment value
- Sales order number
- Part numbers
- Outstanding and despatched quantity
- Unit of measure
- Value

Functions

Commitments (F14)

Use this to select a different type of commitment. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Whole Order Enquiry (F15)

Use this to display the standard [Sales Order Processing](#) Whole Order Enquiry window. For more information, refer to the [Sales Order Processing](#) product guide.

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Labour Commitment Pop-up

To display this pop-up, select Labour on the Commitment Enquiry Selection pop-up, which is displayed when you select **Commitments (F14)** on any window in this [task](#) on which it is available.

This pop-up displays the labour commitments for the selected [job](#). The details displayed include:

- Basic customer and [job](#) details
- Labour commitment value
- Estimated hours left
- [Cost](#) list
- Hourly rate

Fields**Job/Sub-job/Task**

You can use this field to display details for another [job](#), [sub-job](#) or [task](#).

You can use the prompt facility on this field to select from the Select [Job](#) Detail pop-up.

Functions**Commitment (F14)**

Use this to select a different type of commitment. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Purchasing Commitments Window

To display this window, select Purchasing on the Commitment Enquiry Selection pop-up. This is displayed when you select **Commitments (F14)** on any window in this [task](#) on which it is available.

Use this window to view the purchasing commitments. The information displayed on this window includes:

- Basic customer and [job](#) details

- Commitment value
- Purchase order numbers
- Item and supplier details
- Quantity and value
- Order class

Options

Purchase Details

Use this to view the details of the purchase order.

Functions

Commitment (F14)

Use this to select a different type of commitment. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Equipment Servicing Enquiry Invoices Window

To display this window, select **Invoices (F15)** on the Equipment Servicing Enquiry Financial Details window.

This window displays the details of all invoices and credit notes raised against the selected [job](#). The top of the window displays the basic customer and [job](#) details. The details displayed include:

- Date
- Customer invoice address code
- Invoice or credit note number
- Value
- VAT code and value

Options

Invoice Details

Use this to view the details of the invoice. For more details, refer to the Enquire on Invoice section in the Enquiries chapter of this product guide.

Functions

Base/Prime (F14)

Use this to toggle the values in the window between prime currency and base currency.

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Equipment Servicing Enquiry Price Variance Window

To display this window, select **Price Variances (F16)** on the Equipment Servicing Enquiry Financial Details window.

This window displays the details for each price variance. The top of the window displays the basic customer and [job](#) details. The details displayed for each price variance include:

- Date
- Selling price
- [Budget cost](#)
- Estimated hours
- User
- Reason

The software creates a variance record whenever you change the [budget](#), selling price or estimated hours.

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Equipment Servicing Enquiry Stage Payments Window

To display this window, select [Stage Payments \(F17\)](#) on the Equipment Servicing Enquiry Financial Details window.

This window displays the details for each [stage payment](#). The top of the window displays the basic customer and [job](#) details. The details displayed for each [stage payment](#) include:

- Payment number
- Date
- Stage value
- Invoice number
- Retention percentage
- Whether the value of the invoice was overridden during invoice review

Fields

Select

Select one of the following:

Payment details - To display the details of the [stage payment](#) on the [Stage Payment](#) Details window

Text - To display any text associated with this [stage payment](#)

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Stage Payment Details Window

To display this window, select Payment Details against a [stage payment](#) on the Equipment Servicing Enquiry [Stage Payments](#) window.

This window displays the details of the [stage payment](#). These details include:

- Basic [job](#) and customer details
- Selling price
- Retention type
- Original, actual and VAT values in prime and base currency
- Currency details
- Income accounts

Functions

Release Breakdown (F13)

Use this to display a release breakdown for a [stage payment](#). For each released [cost](#), the details displayed include the document reference, release value, currency and [cost](#).

Note: *If the income remains fully deferred with a zero release value, you cannot use this.*

Select **Previous (F12)** to return to the Equipment Servicing Enquiry Financial Details window.

Cost Breakdown Summary Window

To display this window, select **Cost Breakdown This Level (F18)** on the Equipment Servicing Enquiry Financial Details window.

This window displays a summarised breakdown of [costs](#) against [expense types](#). If you [budget](#) against [expense type](#), the [budgets](#) are shown against their actual [costs](#) to date. The variance of actual [costs](#) against [budget costs](#) is shown.

Fields

Select

Select one of the following:

Display details - To display the transactions that make up the actual [cost](#) of this [expense type](#) on the [Cost Breakdown List](#) window

[Costs](#) by period - To display the [costs](#) by period on the Actual [Cost Breakdown](#) by GL Period window

Total Cost

The total [cost](#) value relates to the total of [expense types](#) for this [job](#) detail.

Functions

Rolled Up/This Level (F13)

Use this to toggle between displaying the rolled-up values and this-level values. If you are displaying [task](#) details, the rolled-up values are the same as the this-level values.

Select Display Details against an [expense type](#) and then press Enter to display the [Cost](#) Breakdown List window.

Cost Breakdown List Window

To display this window, select Display Details against an [expense type](#) and then press Enter on the [Cost](#) Breakdown Summary window.

This window displays the transactions for the selected [expense type](#). For each line, the [transaction source](#), type and date, any internal reference and [cost](#) values are displayed.

The total [cost](#) at the top of the window is the total value of the selected [expense type](#) for this [job](#) detail.

Options

Display Details

Use this to display the details of this transaction on the [Cost](#) Breakdown Details window.

Functions

Reverse Sequence (F9)

Use this to reverse the sequence in which the transactions are displayed.

Select **Previous (F12)** to return to the [Cost](#) Breakdown Summary window.

Cost Breakdown Details Window

To display this window, select Display Details against a transaction expense on the [Cost](#) Breakdown List window.

This window displays information for [cost](#) and income. This information includes:

- [Job](#) details
- [Transaction type](#) and source
- References
- Prime and base [cost](#) and value
- Period
- GL account details
- [Cost](#) and profit centre

There are 3 tabs on the window:

Details 1**Details 2****Details 3****Functions****Release Cost Breakdown (F13)**

If you posted a [cost](#) to a fixed price [job](#), use this to display details of all transfers to Profit and Loss or to Fixed Assets.

Destination Details (F14)

If transactions have been posted to the [General Ledger](#), use this to display the details.

Select **Exit (F3)** to leave the enquiry.

Actual Cost Breakdown by GL Period Window

To display this window, select [Cost](#) By Period against an [expense type](#) on the [Cost](#) Breakdown Summary window.

For each GL period, this window displays the list level and rolled up [costs](#).

Options**Transactions**

Use this to display the transactions that make up the [costs](#) for the selected period.

Select Transactions against a period to display the [Cost](#) Breakdown List window.

Indented Cost Breakdown Enquiry Window

To display this window, select [Cost Breakdown Indented \(F19\)](#) on the Equipment Servicing Enquiry Financial Details window.

This window displays an indented breakdown of the rolled up [costs](#). You can use this to display a more detailed enquiry on transaction details.

For each [job](#), [sub-job](#) and [task](#), this window displays the total [cost](#) at this level and rolled up, and the source of the [cost](#).

Fields**Values to Display (5 Fields)**

In the first and third field, enter the values you want to display in the two columns.

In the second and fourth field, enter one of the following:

0 - To display the selected value for this level only

1 - To display the selected rolled up value

In the fifth field, enter one of the following:

0 - To display summary data

1 - To display information by [expense type](#), where available

Options

Select

Use this to select a [job](#) detail line to display more details on the level [costs](#). This displays the [Cost Breakdown Summary](#) window.

Select **Exit (F3)** to leave this enquiry.

Equipment Book In [2/EQS]

Use this [task](#) to receive the items using the [job](#) creation function.

Use this [task](#) to create new workshop [jobs](#) and to book in pre-booked workshop [jobs](#).

To create a [job](#), you need to do the following:

- Identify the [job category](#) or type of [job](#)
- Identify the customer or equipment.
- Enter the [job](#) details.

Note: *The order of the windows, and which windows are displayed, depends upon the [job category](#) you select.*

This function already allows the attachment of a SAC code at [job](#) header level for new [jobs](#) and the amendment of SAC code for existing [jobs](#)

It will obey the same processing rules as [Call Logging](#) in addition mode

Access

You can access the [job](#) you want to create in many ways. You can enter just the [serial number](#), or the [model](#), the customer or customer and account.

Whichever fields you complete on the [Job Creation](#) window, when you press Enter, Equipment Servicing automatically displays lists of missing information so that you can make a selection. So, if you enter just the account number, when you press Enter, a list of addresses is displayed. You then select the machine, etc.

Equipment Book In Window

To display this window, select the Equipment Book In [task](#).

Use this window to enter or select the [job](#) you want to create or maintain.

Fields

Job Category

Enter a valid [job category](#) to specify the type of [job](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used when billing the transactions for this [job](#); it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task](#)/ Document type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Serial Number

Enter the [serial number](#) for the machine.

If more than one [job line](#) is found for that machine, they are all displayed for selection.

If a [job](#) is already outstanding for the machine, it is displayed so that you can update it.

Model

Enter a [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: If you only enter a [model](#), a list of all machines of this [model](#) at all [installation sites](#) is displayed.

Account Number/Account Address

Enter the customer account and address. If you do not enter an address, a list is displayed so that you can select the correct address.

Set up a [call](#) for a customer without an account by setting them up as a cash customer. To do this, enter an existing account (reserve a special dummy number for this purpose). Then enter a new address code. You then enter the name and address of the new [installation](#), followed by the equipment installed at the [site](#). You can then log the [job](#) details.

Customer Order No

Enter the customer order number. This must be on at least one [job](#). Select the [job](#) you require from the displayed list of [jobs](#).

Job Number

If you enter a [job](#), it must be an existing [job](#) for which you have not completed the technical report. When you press Enter, a list of equipment on this [job](#) is displayed.

You can use the prompt facility on this field to select from the Select [Job](#) Header pop-up.

Functions**Save Preferences (F14)**

Use this save the current values on the window to be restored every time you use this [task](#).

New Customer (F18)

Use this to enter a new address for the selected customer. You can use this and a dummy account number to enter details for cash customers.

Pre-book Jobs (F20)

Use this to display the Pre-book [Jobs](#) Enquiry window.

Select the [job](#) you require and then press Enter to display the next window.

Work Control [3/EQS]

Use this [task](#) to control all [jobs](#), once you have received the items using the [Job](#) Creation [task](#).

Description

You use the Work Control Selection window to select one of a number of different methods of displaying the outstanding [jobs](#).

- Enter a single technician to view only those [jobs](#) assigned to this technician.
- Enter a team to display all the [jobs](#) for the team.
- Enter a [branch](#) to display all [jobs](#) for the workshop [branch](#).

You can also display [jobs](#) of a certain status or type, for a specific batch, [division](#), [model](#) etc.

A list of all [job lines](#) matching the entered selection parameters is displayed. Amongst other things, you can override the work allocation, and assign a [job](#) status.

You can also enter technician and team messages. You cannot receive technician messages in Work Control.

This function allows the amendment the SAC code at [job](#) header level

Work Control Selection Window

To display this window, select the Work Control [task](#).

Use this window to:

- Review and update all your outstanding [jobs](#) and their statuses
- Allocate [jobs](#) to technicians
- Enter your [timesheets](#)
- Order parts for a [job](#)

You can update the [jobs](#) individually as required, to assign, allocate or despatch the technician, or to update the status to work in progress, awaiting parts, completed, etc.

When a technician completes a [job](#), they complete a [timesheet](#) which contains all the [job](#) details, including labour hours, expenses and any spare parts used. You can enter the [timesheet](#) details in this [task](#).

You can also order spare parts to complete an existing [job](#) or a return [job](#).

The Work Control Selection window is where you select the outstanding [jobs](#) you want to display.

- You can enter a single technician to see only those [jobs](#) assigned to this technician.
- You can enter a team to display all the [jobs](#) for the team.
- You can see all [jobs](#) for the service [branch](#).
- You can see all [jobs](#) for specific equipment, equipment type, customers or type of [job](#)

All of the selections above are mutually exclusive.

Additional fields mean you can select [jobs](#) of a certain status or type (for example, planned or breakdown [jobs](#)).

Fields

Jobs for the Branch

You can optionally **check** this field to display all [jobs](#) for the [branch](#).

Messages for the [branch](#) are not displayed before the [job](#) list. To check [branch](#) messages, select the Technician Messages [task](#).

Jobs for Customer/Location

You can optionally enter the customer and [location](#) for which you wish to display a list of [jobs](#).

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Jobs for Job Category

You can optionally enter the [job category](#) for which you wish to display a list of [jobs](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Jobs for Job Number

You can optionally enter the [job](#) number for which you wish to display a list of [jobs](#) lines.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Jobs for Customer Order

You can optionally enter the customer order number for which you wish to display a list of [jobs](#) lines.

Jobs for a Team

You can optionally enter the team for which you want to display the [jobs](#).

Alternatively, use the prompt facility to select from the Team Description pop-up.

Any outstanding team messages are displayed before the [job](#) list.

Jobs for a Technician

You can optionally enter a technician for whom you want to display the [jobs](#).

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Any outstanding technician messages (to the technician, to the team or to the [branch](#)) are displayed before the [job](#) list.

Jobs for Serial Number

You can optionally enter the [serial number](#) for which you wish to display a list of [jobs](#) lines.

Jobs for Model Number

You can optionally enter the [model](#) number for which you wish to display a list of [jobs](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Jobs for Model Hierarchy

You can optionally enter the [model](#) hierarchy for which you wish to display a list of [jobs](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection, [Model](#) Group Selection and [Model](#) Subgroup Selection pop-ups.

The [model](#) hierarchy has three levels and one, two or all three levels can be entered.

Scheduled PM (1) or Callout (2)

Select the [job](#) type for which you wish to display a list of [jobs](#) lines.

Scheduled PM [jobs](#) are generated by the [contract](#) system whereas [Callout jobs](#) are entered using [Call](#) Logging or Equipment Book in.

You must leave this field blank if you wish to see both [job](#) types in a list.

This field requires one of the other main selections to have been entered and works in conjunction with the status range. Therefore you can select PM [jobs](#) for a customer in the status range 01-06 or [Call](#) Out [jobs](#) for a [model](#) number in the status range 22-30.

Status Ranges/To

Enter the status range for which you wish to display a list of [jobs](#) lines.

Alternatively, use the prompt facility to select from the [Job Line](#) Status pop-up.

Summary (1) or Detail (0)

Indicate whether the [Job](#) List window should be initially displayed in summary or detail mode.

If you select **Summary**, only the prime [job](#) will be displayed initially and its attributes will be used in conjunction with the other selection parameters. Therefore if **Summary** is selected and a [job category](#) is selected, only prime [jobs](#) with that [job category](#) will be selected.

If **Detail** is selected for the same [job category](#), all [job lines](#) with that [job category](#) will be selected even if the prime [job](#) does not share this attribute.

Name (0) or Information Flags (1)

You must select the display attributes for the next window.

If you select **Name**, the customer name will be displayed on each [job line](#).

If you select **Information Flags**, four information flags will be displayed per [job line](#) to indicate if [costs](#), commitments, reporting codes and meter readings have been entered against the line.

Functions**Work Load Screen (F6)**

Use this to display the Scheduled/Appointment [Calls](#) window.

Message Entry (F8)

Use this to enter technician messages.

Save Preferences (F14)

Use this to save the current window values as your preferences. These selections will be pre-filled every time you select this [task](#).

Enter the selection criteria and press Enter to display the Work Control [Job Lines](#) window.

Work Control Job Lines Window

To display this window, select Enter on the Work Control window

Use this window to:

- Manage the resources required to progress [jobs](#). These resources include technicians, parts and subcontractors.
- Enter [job](#)-related information such as [quotations](#), [timesheets](#) and text.
- Progress the [job](#) through the various stages required by your business.

You can update the [jobs](#) individually as required, to assign, allocate or despatch the technician, or to update the status to work in progress, awaiting parts, completed, etc.

When a technician completes a [job](#), they complete a [timesheet](#) which contains all the [job](#) details, including labour hours, expenses and any spare parts used. You can enter the [timesheet](#) details using one of the options in this [task](#).

You can also order spare parts to complete an existing [job](#) or a return [job](#).

This window displays the [job](#) details, including [job](#) number, status, [model](#), action, and target date for each [job](#).

Note: When you select a technician, this window displays any unassigned urgent [jobs](#). These are [jobs](#) for the [branch](#), which have a target response date and time before any of the [jobs](#) assigned to the selected technician.

Fields

Select

Use this field to change the [job line](#) status or [call](#) a function to perform actions on the [job line](#). The list is built from a list of options in the Codes/Parameters file.

There is authorisation on this window that operates at both team and option level.

Team Authorisation

If a [job line](#) is displayed but the select field is not enabled against the line, you are not authorised to the team on this line. Use the Maintain Team Authorisation [task](#) to perform the authorisation.

Option Authorisation

If a [job line](#) is displayed but you are not allowed to enter options from the option list against it, you are not authorised to this option. Use the Maintain User Group/Function Codes Restrictions [task](#) to perform the authorisation. The function authorities are created against user groups which were attached to your user ID when you were authorised to work in this [branch](#). You can view your user group authority in the Maintain User/[Branch](#) Authorities [task](#).

Note: Some functions in the list cannot be entered against a [job line](#). They are used by the Equipment Servicing batch processes.

Option Processing

Opt	Description	Update Performed	Function Called
01*	Customer to send	n/a	n/a
02*	Collect from customer	n/a	n/a
05*	Telephone call required	Status to 05	n/a
07*	Credit problem	n/a	n/a
08*	Maintain Fiscal Document Type	n/a	Fiscal type maintenance
09	Indian Details	n/a	SAC code
14*	Suggest accept for refurbish	Status to 14	n/a
15*	Suggest reject for refurbish	Status to 15	n/a
20	Open	Status to 20	Remove from technician
22	Assign	n/a	Assign technician
24	Schedule	n/a	Schedule technician

26	Despatch	n/a	Job details
28	Work in Progress	Status to 28	n/a
30	Complete not documented	Status to 30	n/a
37	Timesheet	n/a	Timesheet entry
40*	Quotation maintenance	n/a	Quotation maintenance
41*	Quotation print	n/a	Quotation print
42*	Quotation close	n/a	Quotation close
43	Job completion	n/a	Job completion maintenance
44	Return job	n/a	Return job maintenance
45	Job structure	n/a	Job structure maintenance
46	Change job duration	n/a	Change job duration
47	Job story text	n/a	Job story text maintenance
48	Job history enquiry	n/a	Job history enquiry
49	Job maintenance	n/a	Job details maintenance
50	Work complete and documented	n/a	n/a
55*	Ready for despatch	Status to 55	n/a
56*	Ready for despatch to workshop	Status to 56	n/a
57*	Ready for despatch to third party	Status to 57	n/a
60*	Confirm despatch to customer	Status to 60	
61*	Confirm despatch to workshop	n/a	Target workshop entry
62*	Confirm despatch to third party	Status to 62	Target third party entry
87*	Factory claim made	Status to 87	
91*	Factory claim not made	Status to 91	
92*	Factory claim rejected	n/a	Reason code entry
93*	Factory claim accepted	n/a	Claim value entry
98*	Cancelled	n/a	Reason code entry

Note: Options marked with * can only be performed against the prime [job](#). The status change/function must apply to the entire [job](#).

Note: There is additional control to ensure that [job lines](#) in a certain status can only have appropriate status changes/functions performed against them. This relationship is established using the Maintain Invalid Status/[Status Code](#) Combinations [task](#) on the [Company](#) Parameters menu.

Functions

Refresh (F5)

Use this to rebuild the window using the selections previously entered on the prompt window.

Work Load (F6)

Use this to display the Team Workload window.

This is only available if you have selected a team.

Tech Msg. (F8)

Use this to enter technician messages.

Fold/Truncate (F13)

Use this to display more details for each [job line](#).

Expand/Summarise (F16)

Use this to display in summary form (one line per [job](#)) or in detail form, where all the [job lines](#) are displayed in [job](#) number, [sub-job](#) and [task](#) sequence.

Enter the option and press Enter to perform the function.

Scheduled/Appointment Calls Window

To display this window, select **Work Load Screen (F6)** on the Work Control Selection window. This is only available if you have selected a team.

The window displays scheduled and unscheduled [jobs](#) in graphical format, with colours representing the time remaining to target. It displays up to 20 technicians in two rows.

Note: Place the cursor on a technician code and then press Enter to display the work queue.

Note: Place the cursor on the unscheduled [calls](#) line and then press Enter. Select the [job category](#) required, or leave it blank, and then press Enter to display the Technician Work Allocation window, where you can then select the required [job](#).

The [calls](#) to schedule to a technician are displayed as blocks in the preferred order of completion. This only displays four [jobs](#) for a technician. If you allocate more than four [jobs](#) to the [job](#) queue, the subsequent [jobs](#) are no longer Unscheduled, but are not displayed as Scheduled.

The colour of each block represents the [job's](#) time from target:

Red & Flashing **** - Within 0:30 hrs:mins of target time

Red - Between 0:30 and 2:30 hrs:mins from target time

Amber - Between 2:30 and 4:30 hrs:mins from target time

Green - Between 4:30 and 6:30 hrs:mins from target time

Blue - Between 6:30 and 8:30 hrs:mins from target time

White - More than 8:30 hrs:mins from target time

Functions

Move (F11)

Use this to move the [job](#) to a technician queue and schedule the [job](#). Place the cursor on a [job](#) block and then select **Move (F11)**. If there are four [jobs](#) already scheduled, you can insert the [job](#) in position 1, 2, 3 or 4. Place the cursor on the [job](#) before which you want to schedule the new [job](#), and then press Enter. If the [call](#) cannot be scheduled, an error message is displayed. You can override some errors.

Select **Previous (F12)** to return to the previous window.

Remove from Technician Pop-up

To display this pop-up, enter 20 (Open) against a [job line](#) and then press Enter on the Work Control [Job Lines](#) window or the [Job](#) Structure Resource View window.

Use this pop-up to remove a technician from a [task](#), entire [sub-job](#) or entire [job](#).

Functions

Update Task (F8)

This will remove the individual [task](#) from the technician and clear any associated fields, such as estimated date and time of arrival.

Update Sub-job (F14)

This will remove all the [tasks](#) for the displayed [sub-job](#) from the technician. To achieve this, all labour [tasks](#) in the [sub-job](#) must be at the same status and, if already assigned or scheduled, must be for the same technician.

Update Job (F16)

This will remove all the [sub-jobs](#) and [tasks](#) for the displayed [job](#) from the technician. To achieve this, all [tasks](#) in the [job](#) must be at the same status and, if already assigned or scheduled, must be for the same technician.

Select **Update [Task](#) (F8)** to remove the [task](#) from the displayed technician.

Assign Technician Pop-up

To display this pop-up, enter 22 (Assign) against a [job line](#) and then press Enter on the Work Control [Job Lines](#) window or the [Job](#) Structure Resource View window.

Use this pop-up to assign a [job](#) to a different technician. The [job](#), [model](#) and previously assigned technician are displayed.

Fields

To Technician

Enter a technician.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

This displays the [job's](#) skill requirements and the technicians in the team with these skills.

Functions**Update Task (F8)**

Use this to assign the [task](#) to the entered or selected technician. The status will be changed to 22.

Update Sub-job (F14)

Use this to assign all the [tasks](#) for the displayed [sub-job](#) to the same technician. To achieve this, all [tasks](#) in the [sub-job](#) must be at the same status and, if already assigned or scheduled, must be for the same technician.

Update Job (F16)

This will assign all the [sub-jobs](#) and [tasks](#) for the displayed [job](#) to the same technician. To achieve this, all [tasks](#) in the [job](#) must be at the same status and, if already assigned or scheduled, must be for the same technician.

Select **Update [Task](#) (F8)** to assign the [task](#) to the selected technician.

Note: You can override warnings on skills, team membership and absence by selecting **Override (F14)**.

Schedule Technician Pop-up

To display this pop-up, enter 24 (Schedule) against a [job line](#) and then press Enter on the Work Control [Job Lines](#) window or the [Job](#) Structure Resource View window.

Note: This pop-up is the same as the Assign Technician pop-up except for the extra field, Position in Queue.

Use this pop-up to schedule the selected [job](#).

Fields**To Technician**

Enter a technician.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

This displays the [job's](#) skill requirements and the technicians in the team with their skills.

Position in Queue

Enter the position in the queue. You can use this to add a [job](#) after [jobs](#) already scheduled, or to insert a [job](#) ahead of an existing one. If this affects another [job's](#) target date and time, a warning is displayed.

Functions

Update Task (F8)

Use this to schedule the [task](#) to the entered or selected technician. The status will be changed to 24.

Update Sub-job (F14)

Use this to schedule all the [tasks](#) for the displayed [sub-job](#) to the same technician. All [tasks](#) in the [sub-job](#) must be at the same status, and if they are already assigned or scheduled, they must all be for the same technician.

Update Job (F16)

Use this to schedule all the [sub-jobs/tasks](#) for the displayed [job](#) to the same technician. All [tasks](#) in the [job](#) must be at the same status, and if they are already assigned or scheduled, they must be for the same technician.

Select **Update Task (F8)** to schedule the [task](#).

Reason Code Entry for Factory Claim Not Made or Factory Claim Rejected Pop-up

To display this pop-up, enter 92 (Factory Claim Rejected) against a prime [job line](#) and then press Enter on the Work Control [Job Lines](#) window.

Use this pop-up to assign an action to a [job](#).

Fields

Enter Reason Code

Enter a reason.

Alternatively, use the prompt facility to select from the Credit Reason Code pop-up.

Note: You set up reason codes in the Codes/Parameter file under parameter type CREA.

Select **Update (F8)** to update the [job](#)

Warranty Claim Value Entry Pop-up

To display this pop-up, enter 93 (Factory Claim Accepted) against a prime [job line](#) on the Work Control [Job Lines](#) window.

Use this pop-up to enter a manufacturer's credit value. This will be added as a direct revenue value to the [job](#) at prime [job](#) level.

EQ09301EQ1F099, EQ1F099

Fields

Manufacturer's Credit Value

Enter a positive value. This value will be used to create a direct transaction (with a negative value) against the [job](#). This will therefore add revenue back into the total [costs](#) of the [job](#) to reduce the actual [cost](#) of the [job](#) to the service [branch](#).

Select **Update (F8)** to update the [job](#).

Cancel Job Line Reason Pop-up

To display this pop-up, enter 98 (Cancel) against a [job line](#) on the Work Control [Job Lines](#) window.

Use this pop-up to cancel the selected [job line](#) and enter a reason for the cancellation.

Fields

Enter Reason Code

Enter a reason.

Alternatively, use the prompt facility to select from the [Call](#) Cancellation Reason Code pop-up.

Note: *You set up reason codes in the Codes/Parameter file under parameter type CREA.*

Select **Update (F8)** to cancel the [job](#).

Maintain Credit Calls [4/EQS]

Use this [task](#) to cancel or release [calls](#) whose status is credit hold.

Concepts

If a customer on credit stop places a [call](#), you can log the [call](#); however, Equipment Servicing filters the [call](#) out of the technician workload until you authorise the [call](#).

Description

You can view [calls](#) recorded as status 07 (Credit Hold) by selecting the status for technician, [branch](#) or team in the Work Control [task](#).

You can review any of the [company's](#) held [calls](#), unless credit [call](#) maintenance is limited to [branch](#). To set up [branch](#) credit control, **check** the Credit Control by [Branch](#) field on the [Company](#) Profile Maintenance Assignment window. If you need to carry out credit control across the [company](#), leave the field **unchecked**.

Equipment Servicing only checks the credit stop flag when you log the [call](#). If you clear an account on credit hold, you must manually release [jobs](#) already logged.

Within this [task](#), you can view the [Job](#) Story text.

Credit Call Maintenance Selection Window

To display this window, select the Maintain Credit [Calls task](#).

Use this window to select the [calls](#) for which you want to maintain the credit status.

Fields

Note: To see all orders on credit hold, leave all fields blank and then press Enter.

Account No

You can optionally enter an existing customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Location

You can optionally enter the [location](#) for the customer.

Note: Complete the Account No field and not the [Location](#) field in order to display a list of all the [locations](#) for the selected customer.

Serial Number

You can optionally enter the [serial number](#) of an installed piece of equipment.

Model Number

You can optionally enter a [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Enter the [model](#) number and then press Enter in order to display a list of all the [models](#).

Job Number

You can optionally enter an outstanding [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Enter the selection criteria and then press Enter to display the Credit [Call](#) Maintenance Detail window.

Credit Call Maintenance Detail Window

To display this window, enter your selection criteria on the Credit [Call](#) Maintenance Selection window.

Use this window to view and maintain the details for [calls](#) on credit hold.

Fields

Select

Select one of the following:

Cancel - To cancel the [call](#)

You must enter a reason. You maintain [call](#) cancellation reason codes in the Codes/Parameters file, under parameter type CREA.

Release - To release the [call](#) from credit hold

You must enter a reason. You maintain credit release reason codes in the Codes/Parameters file, under parameter type RRES.

Text - To enter text associated with the [job line](#) text

You can also do this in Work Control.

[Job](#) Enquiry - To display the [Job Line](#) Detail window for the [job](#)

Ledger - To display the standard [Accounts Receivable](#) Enquiry

Functions

Fold/Truncate (F13)

Use this to display additional information for each [call](#).

Select **Exit (F3)** to leave the [task](#).

Timesheet Entry [5/EQS]

Use this [task](#) to enter labour, mileage and expenses against a [job](#).

Concepts

This is the facility used to enter the details of completed work from the technician. For each [timesheet](#) entry, various details that apply to all of the transactions can be entered on the header windows; these include technician number, [job](#) number, [visit](#) date and posting period.

Hours

Hours spent on each piece of equipment are entered, qualified by a four-level reporting code hierarchy. Both labour and travel time can be booked at up to four different rates, i.e. basic rate plus three overtime rates. The hours are classified as non-chargeable (0%), or chargeable (100%), according to the [cover type/job category](#) charge matrix for the [contract type/job category](#) combination defined; the charge percentage can be changed to any intermediate value between 0% and 100%.

Expenses

Miscellaneous [costs](#) incurred in carrying out the service or repair of each piece of equipment are entered. For each [cost](#), a charge type code (with its file or user-overwritten description), the [cost](#) value and charge value are entered/displayed, or the charge is derived by using a default percentage uplift from the [Job Category](#) file.

It is also possible to enter a distance driven, in miles or kilometres, which will be used as a distance charge against the [job](#). This is the only way to enter distance transactions against the [job](#).

A [job](#) may require more than one technician [visit](#) to complete the work, in which case several [timesheets](#) can be entered. After the final [timesheet](#) is entered, you indicate that the [job](#) is finished by setting a complete flag and the status of the [job](#) changes to 50. At any point during the life cycle of the [job](#), it is possible to invoice those transactions created so far. In addition, it is possible to complete the [job](#) in an ad-hoc way or leave it open so that further [timesheets](#) can be entered later.

[Timesheet](#) lines can be added for the same [job](#) number/[sub-job](#)/[task](#)/technician/date within another [timesheet](#) session.

This means that if you erroneously enter [timesheet](#) transactions for a technician, it is possible to reverse them and then create a new transaction for the same [job](#)/sub [job/task](#)/technician/date. Then the correct transaction (number of hours) can be entered.

Therefore validation within the [Timesheet](#) Entry [task](#) allows entry of a duplicate transaction. However, it is not possible to add duplicate transactions for the same [job](#)/sub [job/task](#)/technician/date in the same session.

Timesheet Add Window

To display this window, select the [Timesheet](#) Entry [task](#).

Use this window to enter the [service period](#) to which the [timesheet](#) will be posted.

Fields

Period

Enter the period that you wish to use. This period will default to the current [service period](#) and you can change it to be the current period plus 1.

For example, you may be trying to enter [timesheets](#) for the first week in July but the [service period](#) may still be in June. You should not change the [service period](#) until [timesheets](#) for that period have been entered and reconciled.

Press Enter to display the [Timesheet](#) Entry window.

Timesheet Entry Window

To display this window, press Enter on the [Timesheet](#) Add window.

Use this window to enter the technician and the date of the [timesheet](#).

Fields

Technician

Enter the technician code that you wish to use.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

If you enter a technician code, it will be protected on the [Timesheet](#) Detail window.

If you do not enter a technician code, you will be able to enter different technicians on the [Timesheet](#) Detail window.

Date

Enter or select the date you wish to use. If you enter a date, the date will be protected on the [Timesheet](#) Detail window. If you do not enter a date, you will be able to enter different dates on the [Timesheet](#) Detail window.

If a date is entered here, it must normally be a valid date in the period already entered on the window.

However, you can enter a number of days in the Equipment Servicing Codes/Parameters file under type TPER and this will allow you to enter transaction dates this number of days previous to the period start date. You can therefore enter missed [timesheets](#) from previous periods but they will still post into the period on the window (probably the current period).

Press Enter to display the [Timesheet](#) Detail window.

Timesheet Detail Window

To display this window, press Enter on the [Timesheet](#) Entry window.

Use this window to add new [timesheets](#). Every session of [timesheet](#) entry is given a different session number, which is displayed in the window heading. You can use this session number to select [timesheets](#) for amendment. This is important if many technicians and [timesheet](#) dates were entered in the same session.

Fields

Technician

Enter the technician code that you wish to use.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

If the technician code is protected, it must have been entered on the [Timesheet](#) Entry window.

Date

Enter or select the date that you wish to use. If the date is protected, it must have been entered on the [Timesheet](#) Entry window.

If a date is entered here it must normally be a valid date in the period date range displayed on the window.

However, you can enter a number of days in the Equipment Servicing Codes/Parameters file under parameter type TPER and this will allow you to enter transaction dates this number of days previous to the period start date. You can therefore enter missed [timesheets](#) from previous periods but they will still post into the period on the window (probably the current period).

Time

Enter the start time in hours and minutes.

This field is only displayed if the Technical Reporting by Hours or Times field in the [company](#) profile is set to **Times**. It is mandatory.

The 24 - hour clock is valid. Therefore 14:00 is a valid time and 00:00 is a valid time.

A start time and number of hours can be entered that will take the [job](#) duration over midnight. All bookings are held against the start date.

Job Number

Enter the [job](#) number that is to be added to the [timesheet](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Sub-job

Enter the [sub-job](#) code that is to be added to the [timesheet](#).

You cannot enter [sub-jobs](#) that have been used to order parts or raise purchase orders for subcontract activities.

Task

Enter the [task](#) number that is to be added to the [timesheet](#).

You cannot enter [tasks](#) that have been used to order parts or raise purchase orders for subcontract activities.

Normal

Enter normal labour time. You must enter at least one labour or travel time per [timesheet](#) line entered.

C

This is the [job](#) completion flag.

Enter one of the following:

1 Technician work complete

This removes the technician from the [job line](#) if the technician is assigned or scheduled.

2 [Job](#) complete

This completes the [job line](#) by changing the status to 50.

3 Return [visit](#) on knowledge req.

This value is stored on the [job line](#) as the last completion code entered against it. The technician is removed from the [job line](#).

4 Return on day end - customer

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

5 Return on day end - technician

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

6 Return [visit](#) - personal reason

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

7 Return [visit](#) - no m/c access

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

8 [Call](#) stopped by despatching

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

9 Return [visit](#) for parts

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

You can use the prompt facility on this field to select from the Technician Completion Flag pop-up.

Travel

Enter normal travel time.

Allowance Code (AL)

Enter an allowance code. This is a memo field only

Alternatively, use the prompt facility to select from the Allowance Code ([Timesheets](#)) pop-up.

Labour Overtime Fields

There can be up to four labour overtime fields displayed. The headings on these fields are soft-coded in the Maintain [Timesheet Uplift Codes task](#), as is the control over whether they are displayed or not.

Travel Overtime Fields

There can be up to four travel overtime fields displayed. The headings on these fields are soft-coded in the Maintain [Timesheet Uplift Codes task](#), as is the control over whether they are displayed or not.

Options

Amend

Use this to amend the [timesheet](#) line. The values will be placed in the input fields at the bottom of the window for amendment.

Expenses

Use this to enter or amend expenses for the [timesheet](#) line. The expenses will inherit the transaction date of the [timesheet](#) line. Expenses include mileage.

Delete

Use this to delete the [timesheet](#) line. Any expenses associated with the [timesheet](#) line will not be deleted.

Overrides

Use this to override the travel hours to be invoiced to the customer or the [job category](#) of the [timesheet](#) line. Changing the [job category](#) can alter the chargeability of the [timesheet](#) line. For instance, the technician may have been sent to work on a breakdown [job](#) but has decided that it is actually customer misuse or he might start work on piece of equipment that was covered by warranty but then decide that customer damage has caused the problem.

Inv. Text

Use this to enter text to be printed on any invoice produced for the [job](#). The text is at [job](#) number level and will be printed on ALL invoices produced for the [job](#) number.

Parts

Use this to [call](#) a function where the technician can report additional parts used or to return unused ordered parts.

Track/Rpt

Use this to enter fault reporting codes and to perform administrative functions on the equipment, such as [serial number](#) change and name and address change.

Press Enter. If the Technical Reporting by Hours or Times field in the [company](#) profile is set to **Times**, the Daily Arrival and Departure Times pop-up is displayed. Otherwise, the validated [timesheet](#) line is written to the table on this window and you can select **Update (F8)** to update the [timesheet](#) session.

Note: If **Exit (F3)** or **Previous (F12)** is selected, a warning window is displayed if lines have been added (or amended) to warn you that the transactions or changes will be lost.

Daily Arrival and Departure Times Pop-up

To display this pop-up, press Enter on the [Timesheet](#) Detail window, if the Technical Reporting by Hours or Times field in the [company](#) profile is set to Times.

Use this pop-up to view and accept or reject the start date and time and the calculated end date and time.

Fields

End Date & Time

These fields are calculated by adding the total hours entered on the [timesheet](#) line and adding it onto the [timesheet](#) line start date and time.

Select **Update (F8)** to accept the time and dates and create the [timesheet](#) entry on the [Timesheet](#) Detail window.

Alternatively, select **Previous (F12)** to return to the [Timesheet](#) Detail window without update.

Timesheet Overrides Pop-up

To display this window, select Overrides against a line on the [Timesheet](#) Entry or [Timesheet](#) Amend window.

Use this window to override the invoice travel hours and [job category](#) of the [job line](#).

Fields

Invoice Travel Time

Use this to enter invoice travel time if it differs from the actual travel time entered on the [timesheet](#) line. If an override is entered here, this number of hours at the normal hourly rate will be charged to the customer, irrespective of the number of travel hours, normal or overtime entered on the [timesheet](#) line. The hours on the [timesheet](#) line will still be used to calculate the [job costs](#).

Job Category

Use this to change the [job category](#) of the [job line](#). Changing the [job category](#) can alter the chargeability of the [timesheet](#) line. For instance, the technician might have been sent to work on a breakdown [job](#) and then decided that it was actually caused by customer misuse or might have been sent out to a piece of equipment that was covered by warranty and then decided that customer damage caused the problem.

You can use the prompt facility on this field to select from the [Job Category](#) Selection pop-up.

Invoice Labour %

Use this to change the chargeability of a [job](#). When you enter this pop-up, the current chargeability of the line is displayed. This is normally 0 or 100% and is derived from the [cover type/job category](#) charge matrix using the [job category](#) on the [job line](#) and the [cover type](#) of the piece of equipment.

You can change a [job line](#) from chargeable to non-chargeable (or vice versa) without changing the [job category](#).

Select **Update (F8)** to update the [job](#).

Timesheet Expenses Entry Window

To display this window, select Expenses on the [Timesheet](#) Entry or [Timesheet](#) Amend Detail window or press Enter on the [Timesheet](#) Expenses Selection window.

Use this window to view and maintain expenses against a [timesheet](#) line.

Fields

Total Mileage/Klms to Date

You can update the total mileage or kilometres to date for the technician. This defaults from the Technician Details file. The value here is for information only.

CC

Enter the [charge code](#) which describes the expense.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

Where India function is active, this should have a valid SAC code relationship set up

Description

The description will default from the [charge code](#) entered. You can override this description. The override will be printed on the invoice.

Miles/Klms

Use this to enter the distance driven. If a value is entered, this will make this expenses line a mileage line.

Net Amount

Enter the net amount of the expense line.

If you want to enter mileage expenses using the standard claim and charge rates for that employee, leave this field blank. Enter the number of miles in the Miles/Klms field.

Note: When you amend this field, you do not alter the VAT value.

Note: You can only override the employee mileage rate and the charge rate by entering the amounts required in the Net Amount and the Charge Amount fields.

Curr

This field displays the currency code that will be used for the expense.

Enter a valid currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Invoice Amnt

Enter the charge amount. You cannot enter a value if you entered a distance value.

Leave this field blank to calculate the charge automatically using either the percentage mark-up for expenses as set up in [job](#) type, or, if you are entering mileage expenses, the mileage chart rate.

Note: If the [cost](#) currency differs from the income currency, you must enter a charge, since the software does not use the mark-up percentage to calculate re-charge values automatically for invoices or chargeable reviews.

VAT

Enter the VAT code to use.

Alternatively, use the prompt facility to select from the Select VAT Code pop-up.

If you leave this field blank, when you press Enter for a net amount or mileage expense, the VAT defaults to the VAT rate code on the [expense type](#) set up in the [job](#) type.

VAT Amnt

Enter the VAT amount. Leave this field blank to calculate the VAT automatically using the entered VAT code.

Options

Amend

Use this to change the expense details. The line will be transferred to the input fields for modification.

Delete

Use this to remove all details from the line.

Overrides

Use this to change the [job category](#) of the [job line](#) or whether the line is chargeable or not. This will display the Expenses Override pop-up.

Invoice Text

Use this to enter text that will be printed on the [job](#) invoice.

Press Enter to validate the details of each expense and then select **Update (F8)** to save. The [Timesheet](#) Detail window is displayed, where you can continue entering details.

Expenses Override Pop-up

To display this window, select Overrides on the Expenses Entry or Expenses Amend pop-up.

Use this window to view and maintain expenses against a [timesheet](#) line.

Fields

Job Category

Changing the [job category](#) can alter the chargeability of the expenses line. For instance, the technician may have been sent to work on a non-chargeable breakdown but may need to charge the customer for one of the expenses.

You can use the prompt facility on this field to select from the [Job Category](#) Selection pop-up.

Invoice Expense

Use this field to change the chargeability of a [job](#). When you enter this pop-up, the current chargeability of the line is displayed. This is normally **unchecked** for not chargeable or **checked** for chargeable. This is derived from the [cover type/job category](#) charge matrix using the [job category](#) on the [job line](#) and the [cover type](#) of the piece of equipment.

Use this checkbox to change a [job line](#) from chargeable to non-chargeable (or vice versa) without changing the [job category](#).

Select **Update (F8)** to update the overrides on the expenses line.

Timesheet Amend [6/EQS]

Use this [task](#) to amend previously entered [timesheets](#).

Concepts

This is the facility used to amend the details of any [timesheet](#) line until the [timesheet](#) has been reconciled and updated using the [Timesheet Reconciliation task](#).

[Timesheets](#) can be retrieved by period and technician or by session. There can be lines for many technicians and dates in the same session so you may wish to examine this information by session or access many sessions if you select technician and period.

You can add new [timesheet](#) lines using this [task](#) as well as amend existing lines.

Labour hours, travel hours, distance parts issues or returns and expenses can all be amended in this [task](#) up until the [timesheet](#) line has been reconciled.

If you have completed a [job](#) within [Timesheet Entry](#) it cannot be re-opened using this [task](#). However, you can complete a [job](#) through [Timesheet Amend](#).

Timesheet Amend Selection Window

To display this window, select the [Timesheet Amend task](#)

Use this window to select the required [timesheet](#) by period and technician or by session number.

You must enter either a period and technician or a session number.

Fields

Period (YYMM)

The period will default to the current [service period](#) and can be changed to the period that you wish to use.

Un-posted [timesheets](#) for the period and technician will be displayed in the detail window.

Technician

Enter the technician code that you wish to use.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Un-posted [timesheets](#) for the period and technician will be displayed in the detail window.

Session Number

Enter the session number that you wish to use.

Un-posted [timesheets](#) for the session number will be displayed in the detail window. A session could have [timesheets](#) for many technicians and many dates.

Press Enter to display the [Timesheet](#) Amend Details window.

Timesheet Amend Details Window

To display this window, press Enter on the [Timesheet](#) Amend Selection window.

Use this window to amend existing [timesheet](#) lines or add new [timesheet](#) lines. If you chose to amend by technician and period, only [timesheet](#) lines for the technician and date will be displayed.

If you entered a session number, you may have [timesheet](#) lines for many different technicians and dates.

In both cases, if the time sheet line has already been reconciled using the [Timesheet](#) Reconciliation [task](#), the [timesheet](#) lines are displayed but are protected.

Fields

Technician

Enter the technician code that you wish to use.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

If the technician code is protected, it must have been entered on the [Timesheet](#) Amend Selection window.

Date

Enter or select the date that you wish to use.

If a date is entered here, it must normally be a valid date in the period date range displayed on the window.

However, you can enter a number of days in the Equipment Servicing Codes/Parameters file under parameter type TPER and this will allow you to enter transaction dates this number of days previous to the period start date. You can therefore enter missed [timesheets](#) from previous periods but they will still post into the period on the window (probably the current period).

Time

Enter the start time in hours and minutes.

This field is only displayed if the Technical Reporting by Hours or Times field in the [company](#) profile is set to **Times**. It is mandatory.

The 24 - hour clock is valid. Therefore 14:00 is a valid time and 00:00 is a valid time.

A start time and number of hours can be entered that will take the [job](#) duration over midnight. All bookings are held against the start date.

Job Number

Enter the [job](#) number that is to be added to the [timesheet](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Sub-job

Enter the [sub-job](#) code that is to be added to the [timesheet](#).

You cannot enter [sub-jobs](#) that have been used to order parts or raise purchase orders for subcontract activities.

Task

Enter the [task](#) number that is to be added to the [timesheet](#).

You cannot enter [tasks](#) that have been used to order parts or raise purchase orders for subcontract activities.

Normal

Enter normal labour time. You must enter at least one labour or travel time per [timesheet](#) line entered.

Job Completion Flag (C)

Enter one of the following:

1 Technician work complete

This removes the technician from the [job line](#) if the technician is assigned or scheduled.

2 [Job](#) complete

This completes the [job line](#) by changing the status to 50.

3 Return [visit](#) on knowledge req.

This value is stored on the [job line](#) as the last completion code entered against it. The technician is removed from the [job line](#).

4 Return on day end - customer

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

5 Return on day end - technician

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

6 Return [visit](#) - personal reason

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

7 Return [visit](#) - no m/c access

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

8 [Call](#) stopped by despatching

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

9 Return [visit](#) for parts

This value is stored on the [job line](#) as the last completion code entered against it. This is for information only.

Travel

Enter normal travel time.

Allowance Code (AL)

Enter an allowance code.

Alternatively use the prompt facility to select from the Allowance Code ([Timesheets](#)) pop-up.

Labour Overtime Fields

There can be up to four labour overtime fields displayed. The headings on these fields are soft-coded in the Maintain [Timesheet Uplift Codes task](#), as is the control over whether they are displayed or not.

Travel Overtime Fields

There can be up to four travel overtime fields displayed. The headings on these fields are soft-coded in the Maintain [Timesheet Uplift Codes task](#), as is the control over whether they are displayed or not.

Options

Amend

Use this to select amend the line. The values are place in the input fields at the bottom of the window for amendment.

Expenses

Use this to enter or amend expenses for the [timesheet](#) line. The expenses will inherit the transaction date of the [timesheet](#) line. Expenses include mileage.

Delete

Use this to delete the [timesheet](#) line. Any expenses associated with the [timesheet](#) line will not be deleted.

Overrides

Use this to override the travel hours to be invoiced to the customer or the [job category](#) of the [timesheet](#) line. Changing the [job category](#) can alter the chargeability of the [timesheet](#) line. For instance, the technician might have been sent to work on a breakdown [job](#) but then decided that it was actually caused by customer misuse or might have been sent to work on a piece of equipment that was covered by warranty but then decided that customer damage caused the problem.

Inv. Text

Use this to enter text to be printed on any invoice produced for the [job](#). The text is at [job](#) number level and will be printed on ALL invoices produced for the [job](#) number.

Parts

Use this to [call](#) a function where the technician can report additional parts used or to return unused ordered parts.

Track/Rpt

Use this to enter fault reporting codes and to perform administrative functions on the equipment, such as [serial number](#) change and name and address change.

Press Enter. If the Technical Reporting by Hours or Times field in the [company](#) profile is set to Times, the Daily Arrival and Departure Times pop-up is displayed. Otherwise, the validated [timesheet](#) line is written to the table on this window and you can select Update (F8) to update the [timesheet](#) session.

Note: If **Exit (F3)** or **Previous (F12)** is selected, a warning window is displayed if lines have been added (or amended) to warn you that the transactions or changes will be lost.

Daily Arrival and Departure Times Pop-up

To display this pop-up, press Enter on the [Timesheet](#) Amend Details window, if the Technical Reporting by Hours or Times field in the [company](#) profile is set to Times.

Use this pop-up to view and accept or reject the start date and time and the calculated end date and time.

Fields

End Date & Time

These fields are calculated by adding the total hours entered on the [timesheet](#) line and adding it to the [timesheet](#) line start date and time.

Select **Update (F8)** to accept the time and dates and create or amend the [timesheet](#) entry on the [Timesheet](#) Detail window.

Alternatively, select **Previous (F12)** to return to the [Timesheet](#) Detail window without update.

Timesheet Expenses Entry [7/EQS]

Use this to enter stand-alone [job](#) expenses without having to enter a [timesheet](#) line first. The Expense Entry Detail window displayed by this [task](#) is the same window as that displayed when you select the **Expenses** option on the [Timesheet](#) Add window.

Timesheet Expenses Entry Window

To display this window, select the [Timesheet](#) Expenses Entry [task](#).

Use this window to enter a technician, [job](#) number for the expenses. This will then [call](#) the same Expenses Detail window as that [called](#) by the Expenses option on the [Timesheet](#) Add window.

Fields

Technician

Enter the technician code that you wish to use.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Job

Enter the [job](#) number that is to be added to the [timesheet](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Sub-job

Enter the [sub-job](#) code that is to be added to the [timesheet](#).

You cannot enter [sub-jobs](#) that have been used to order parts or raise purchase orders for subcontract activities.

Task

Enter the [task](#) number that is to be added to the [timesheet](#).

You cannot enter [tasks](#) that have been used to order parts or raise purchase orders for subcontract activities.

Date

Enter or select the date that you wish to use.

It must normally be a valid date in the current period.

However, you can enter a number of days in the Equipment Servicing Codes/Parameters file under parameter type TPER and this will allow you to enter transaction dates this number of days previous to the period start date. You can therefore enter missed [timesheets](#) from previous periods but they will still post into the current period.

Press Enter to display the [Timesheet](#) Expenses Entry window.

Direct Transactions [8/EQS]

Direct Transactions is a supplement to the other methods of entering [costs](#) into Equipment Servicing.

Use this [task](#) to enter general-purpose [costs](#). These can cover transactions such as opening balances, or adjustments, such as overhead allocations, [cost](#) smoothing and one-off transfers between [jobs](#).

You can use this [task](#) when transferring invoices from the [Accounts Payable](#) log into the ledger and when entering invoices directly into the ledger.

Direct Transaction Entry Control Details Window

To display this window, select the Direct Transactions [task](#).

Use this window to enter the batch control details.

Fields

Control Value

Enter a control value for the total of all direct transactions entered in this batch.

When you finish the batch, you can override this value so that it agrees with the actual accumulation of the direct transactions, or you can review the batch and amend any transactions.

Period Number

Enter the posting period in the format YYPP, where PP is a period between 01 and the maximum defined for the year. This cannot be less than the GL period.

Press Enter to display the Direct Transaction Entry window.

Direct Transaction Entry Window

To display this window, enter the control details and then press Enter on the Direct Transaction Entry Control Details window.

Use this window to enter the details of the transaction.

Fields

Job/Sub-job/Task

Enter a [job](#) number, [sub-job](#) or [task](#), depending on the [job](#) level required.

You can use the prompt facility on these fields to select from the Select [Job](#) Detail pop-up.

Expense Type

Enter an [expense type](#) code.

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

This must be valid for the selected [job's](#) type. You set up valid [expense types](#) for a [job](#) type using the Maintain [Expense Types task](#).

Trans Source

Enter a [transaction source](#).

Alternatively, use the prompt facility to select from the Select [Transaction Source](#) pop-up.

For identification, **EQ** is recommended.

Trans Type

Enter a [transaction type](#).

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

If this is the same as the [transaction type](#) for [timesheets](#) or [employee expenses](#) in the [company](#) profile, you must enter a valid employee number in the external reference field.

Charge Code

Enter a [charge code](#).

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

Document Reference

The Auto Generate EQ Reference Numbers field in the [company](#) profile controls whether you need to enter a reference here.

If it is **checked**, leave this field blank. When you review the transaction, the software enters a unique internal reference number.

If it is **unchecked**, enter a unique eight-character number. After validation, this is protected and used as the internal reference.

External Reference

Enter a reference, using a maximum of 15 characters. For example, you could use a part number for an inventory transaction.

If this is an employee-related transaction, this must be an employee number.

Narrative

Enter a description, using a maximum of 25 characters.

Date

Enter or select the date of the transaction.

Quantity

Enter a transaction quantity.

Cost

Enter the transaction [cost](#).

Currency

Enter the currency code of the [cost](#).

Alternatively, use the prompt facility to select from the Select Currency pop-up.

This defaults to the base currency of the GL [company](#) profile.

Mark Up %

Enter the percentage mark-up for the transaction. This defaults to the mark-up percentage of the [expense type](#) as set up in [job](#) type. The software applies the mark-up to the [cost](#) and uses it to re-charge the customer. This only applies to Time and Material [jobs](#).

If no default mark-up percentage for the [expense type](#) exists and the [charge code](#) is 1, you must enter a mark-up percentage or charge amount.

Note: If [cost](#) currency differs from the income currency, enter a charge value. The mark-up percentage for that [expense type](#) is not used.

Charge Amount

Enter an amount to re-charge to the customer. You can record a charge amount against a maintainable transaction, and use the amount as the calculated value in the Chargeable Transaction Review [task](#). This field is only valid if you leave the Mark Up % field blank.

If you want to bill your customer the [cost](#) amount:

- Use an [expense type](#) with a zero percentage mark-up.
- Leave the Mark Up % field blank and enter the charge amount figure which is the same as the [cost](#) amount entered.

Functions**Update (F8)**

Use this to end the batch. If you select this without entering anything in this window, the accumulated total remains at zero. You must press Enter twice before selecting **Update (F8)**.

Review (F15)

Use this to review a batch so that you can alter any details of entered transactions.

Override Rate Code (F17)

If the [cost](#) currency is not the same as the base currency, use this to override the currency rate code.

External Text (F21)

Use this to enter additional text to display on time and material invoices for this transaction.

Cancel (F23)

Select this twice to cancel the batch and lose all entries.

Press Enter twice to validate and save the details. This window is displayed again for you to enter more transactions.

After completing all the transactions, select **Update (F8)** to display the Direct Transaction Entry End Batch window.

Direct Transaction Entry Review Details Window

To display this window, select **Review (F15)** on the Direct Transaction Entry window or the Direct Transaction Entry End Batch window.

Use this window to review the transactions entered for this batch. For each transaction, this window displays the [job](#), [sub-job](#) and [task](#) number, the expense and [transaction type](#) and the internal and external references.

Options

Delete

Use this to delete this transaction from the batch.

The transaction details are displayed. Select **Delete Item (F11)** to delete the item.

Review Item

Use this to review the details of this transaction.

The Direct Transaction Entry window is displayed.

Press Enter to display the Direct Transactions Entry End Batch window.

Direct Transaction Entry End Batch Window

To display this window, select **Update (F8)** on the Direct Transaction Entry window or press Enter or **Previous (F12)** on the Direct Transaction Entry Review window.

Use this window to correct the control total, if necessary, and submit the batch [job](#) that processes the batch. This window displays the batch number and accumulated and discrepancy totals.

Fields

Control Total

If the value displayed in the Discrepancy field is not zero, enter the new control total here. This defaults to the control value entered on the Direct Transaction Entry Control Details window.

The control total field is a hash total. If, for example, you have entered 1000 dollars and 530,000 francs, the control value is 531,000.

Functions

Enter More Items (F10)

Use this if you want to add more direct transactions to the batch. You can add more transactions if the control value and the accumulated total are not the same.

Review (F15)

Use this to review the batch for amendment. You can use this to alter the transactions if the control value and the accumulated total are not the same.

Cancel (F23)

Select this twice to cancel the batch.

Note: *The discrepancy field must be zero before you can select **Update (F8)** to update the batch.*

Select **Update (F8)** to update and produce two reports, the Equipment Servicing Posting Validation report and the Interface File Validation (GL report).

Job Completion [9/EQS]

Use this [task](#) to decide manually which transactions are to be billed.

Transactions can be manually selected for billing and other transactions can be left for billing later.

In addition, the amount to be billed can be changed at individual transaction level either by changing the billable amount or billable percentage.

It is also possible to fix the price of the whole [job](#) at this point. If the price for the [job](#) is fixed in [job](#) completion, any subsequent transactions are priced at 0.

For [jobs](#) that were initially [quotations](#), it is not possible to change the billable values, as these are fixed from the [quotation](#).

This function allows the user to change [job category](#). If the user changes [job category](#) then the following additional processing will occur

Note: *For India, the Available date for [Quotation](#) and Fixed price [jobs](#) is left as '9999999' so that they can be viewed in Pending Invoice maintenance (11/EQI). This enables the amendment of Fiscal and SAC codes for Quoted and Fixed price [jobs](#).*

Job Completion Initial Window

To display this window, select the [Job](#) Completion [task](#).

Use this window to select the [job](#) for which you wish to run [job](#) completion.

Fields

Job/Sub-job/Task

Enter the [job](#) for which you wish to use [job](#) completion.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

If the [job](#) is from a [quotation](#), the [job](#) can only be completed at [job](#) level and all levels of the [job](#) have to be at status 50.

If the customer is a proforma customer or an invoice customer, the [job](#) can only be completed at [job](#) level and all levels of the [job](#) must be at status 50.

The [job](#) must not be a warranty claim [job](#).

Press Enter to view the [job](#) transactions.

Job Completion Value Summary Window

To display this window, enter a [job](#) number on the [Job](#) Completion Initial window and then press Enter.

Use this window to view the various levels of the [job](#) and the associated transactions.

The window header shows:

The [job](#) number/[sub-job](#)/[task](#) at the level entered on the selection window

The customer number and name, the [model](#), [job category](#), level 1 and 2 code details and booking dates from the level of the [job](#) selected

The currency of the transactions, with the [cost](#) billed so far, invoice value, outstanding billable and [cost](#) of the transactions listed

The centre of the window shows transactions, grouped by [job](#) level and type.

There are five different types of transaction as follows:

- Labour - This includes fixed price and T&M labour for all overtime types.
- Travel - This includes fixed price and T&M travel for all travel overtime types.
- Expenses - This includes any [employee expenses](#) entered via [timesheet](#) entry or stand-alone expenses entry along with any direct transactions and any subcontract (purchase) transactions.
- Mileage - This is any distance driven in miles or kilometres (soft-coded descriptions) depending on the [company](#) profile setting. These transactions are entered via the [timesheet tasks](#).
- Inventory - These are parts transactions from either sales orders against the [job](#) or the Inventory [tasks](#) within Equipment Servicing.

The descriptions of these five [transaction types](#) are soft-coded in the Codes/Parameters file under parameter type TRCT.

For each of these summary transactions, the total [cost](#), billable and margin are shown for each level in the currency shown in the window header.

Note: For India only: this will only change the HSN/SAC code for the transactions listed on the panel. This will not change the HSN/SAC code at [Job](#) header level.

Fields

Job Category

This is the [job category](#) of the level of the [job](#) selected on the [Job](#) Completion Initial window.

If all the transactions on the window are for the same [job category](#), the [job category](#) is shown as available for input. If users choose to change the [job category](#), they can, but the new [job category](#) must be for the same [job category](#) type.

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

It is not possible to change the type of a [quotation](#).

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

If the [job](#) has a previously entered fixed price, it is not possible to change the [job category](#).

Note: The [Job category](#) type cannot be changed for a Part Tax Only [job category](#).

Select (Sel)

Enter one of the following:

1 - To select transactions for a specific part of the [job](#) to be released for invoicing

The selection can be at a summary level, and if so, all the lower level transactions are selected for the summary.

2 - To display different windows depending on the type of transaction line selected

You use this against a summary line.

For a Labour line, the [Job](#) Transaction Labour window is displayed.

For a Travel line, the [Job](#) Transaction Travel window is displayed.

For a Mileage line, the [Job](#) Transaction Mileage window is displayed.

For an Expenses line, the [Job](#) Transaction Expenses window is displayed.

For an Inventory line, the [Job](#) Transaction Inventory window is displayed.

Functions

Release All (F8)

Use this to transfer all the transactions shown on the window through to the Release for Invoicing window.

Prime/Base (F14)

The transactions shown on the window are shown in the currency at the top of the window. When the window is first displayed, the currency shown is base (of the [company](#)).

Use this to change the values on the window and the literal at the top of the window to the prime currency of the billing customer. This will display in the values that will appear on the invoice, if one is produced.

Against each transaction is a [cost](#) in base and in the currency that it was entered. (It is possible, using purchase subcontract transactions, that the base of the [company](#) is EUR and the billing currency of the [job](#) is GBP, but the subcontract transaction was entered in USD.)

Also against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base.

The Prime/Base toggle allows the customer to see the [costs](#) prices in the billing currency and the base currency.

Note: It is not possible in [Job Completion](#) to see transactions in the currency in which they were entered.

Release Selection (F15)

Use this to transfer any transactions that have been selected to the Release for Invoicing window.

If this function is selected and no transaction has been selected, the Release for Invoicing window will be shown without any transactions.

Stage (F20)

Use this to view the [stage payments](#) for the [job](#). See the [Call Logging](#) section for further information.

Press Enter to view the [job](#) transactions.

Job Transactions Labour Window

To display this window, enter 2 against a labour summary line on the [Job Completion Value Summary](#) window.

This window shows a list of labour transactions that make up the summary values shown on the previous window.

The header of the window indicates that the transactions are for labour and the selected [job/ sub-job/task](#) to which they belong.

Note: This window will be shown in the same currency as the summary window.

Note: If the [job](#) is from a [quotation](#), there may be multiple lines for each [quotation](#); there will be zero [cost](#) lines that are priced, which are the quoted transactions along with zero-priced lines with [costs](#), which correspond to the actual work performed.

Fields

Select (Sel)

Enter 1 to change the [job category](#).

This option is not available for [jobs](#) that are from [quotations](#) or those [jobs](#) that have a previously entered fixed price.

Use this to display a pop-up on which you can enter a new [job category](#).

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

Functions

Prime/Base (F14)

The transactions shown on the window are shown in the currency at the top of the window. When the window is first displayed, the currency shown is the same as the currency on the previous summary window.

Use this to change the values on the window and the literal at the top of the window to the applicable prime/base currency.

Against each transaction is a [cost](#) in base and in the currency in which it was entered. (It is possible, using purchase subcontract transactions, that the base of the [company](#) is EUR and the billing currency of the [job](#) is GBP, but the subcontract [cost](#) transaction was entered in USD.)

Also against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base.

The Prime/Base toggle allows the customer to see the [costs](#) prices in the billing currency and the base currency.

Note: *It is not possible in [Job Completion](#) to see transactions in the currency in which they were entered.*

Select **Previous (F12)** to return to the [Job](#) Completion Value Summary window.

Job Transactions Travel Window

To display this window, enter 2 against a travel summary line on the [Job](#) Completion Value Summary window.

This window shows a list of travel transactions that make up the summary values shown on the previous window.

The header of the window indicates that the transactions are for travel and the selected [job/ sub-job/task](#) to which they belong.

Note: This window will be shown in the same currency as the summary window.

Note: If the [job](#) is from a [quotation](#), there may be multiple lines for each [quotation](#); there will be zero [cost](#) lines that are priced, which are the quoted transactions, along with zero-priced lines with [costs](#), which correspond to the actual work performed.

Fields

Select (Sel)

Enter **1** to change the [job category](#).

This option is not available for [jobs](#) that are from [quotations](#) or those [jobs](#) that have a previously entered fixed price.

Use this to display a pop-up on which you can enter a new [job category](#).

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

Functions

Prime/Base (F14)

The transactions shown on the window are shown in the currency at the top of the window. When the window is first displayed, the currency shown is the same as the currency on the previous summary window.

Use this to change the values on the window and the literal at the top of the window to the applicable prime/base currency.

Against each transaction is a [cost](#) in base and in the currency in which it was entered. (It is possible, using purchase subcontract transactions, that the base of the [company](#) is EUR and the billing currency of the [job](#) is GBP, but the subcontract [cost](#) transaction was entered in USD.)

Also against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base.

The Prime/Base toggle allows the customer to see the [costs](#) prices in the billing currency and the base currency.

Note: It is not possible in [Job Completion](#) to see transactions in the currency in which they were entered.

Select **Previous (F12)** to return to the [Job Completion Value Summary](#) window.

Job Transactions Mileage Window

To display this window, enter 2 against a mileage summary line on the [Job](#) Completion Value Summary window.

This window shows a list of mileage transactions that make up the summary values shown on the previous window.

The header of the window indicates that the transactions are for mileage and the selected [job/sub-job/task](#) to which they belong.

Note: *This window will be shown in the same currency as the summary window when Further Detail is selected.*

Note: *If the [job](#) is from a [quotation](#), there may be multiple lines for each [quotation](#); there will be zero [cost](#) lines that are priced, which are the quoted transactions, along with zero-priced lines with [costs](#), which correspond to the actual work performed.*

Options

Change Job Category

This option is not available for [jobs](#) that are from [quotations](#) or [jobs](#) that have a previously entered fixed price.

Use this to display a pop-up where you can enter a new [job category](#).

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

Functions

Prime/Base (F14)

The transactions shown on the window are shown in the currency at the top of the window. When the window is first displayed, the currency shown is the same as the currency on the previous summary window.

Use this to change the values on the window and the literal at the top of the window to the applicable prime/base currency.

Against each transaction is a [cost](#) in base and in the currency in which it was entered. (It is possible, using purchase subcontract transactions, that the base of the [company](#) is EUR and the billing currency of the [job](#) is GBP, but the subcontract [cost](#) transaction was entered in USD.)

Also against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base.

The Prime/Base toggle allows the customer to see the [costs](#) prices in the billing currency and the base currency.

Note: It is not possible in [Job Completion](#) to see transactions in the currency in which they were entered.

Select **Previous (F12)** to return to the [Job Completion Value Summary](#) window.

Job Transactions Inventory Window

To display this window, enter 2 against an inventory summary line on the [Job Completion Value Summary](#) window.

This window shows a list of inventory transactions that make up the summary values shown on the previous window.

The header of the window indicates that the transactions are for inventory and the selected [job/sub-job/task](#) to which they belong.

Note: This window will be shown in the same currency as the summary window when *Further Detail* is selected.

Note: If the [job](#) is from a [quotation](#), there may be multiple lines for each [quotation](#); there will be zero [cost](#) lines that are priced, which are the quoted transactions, along with zero-priced lines with [costs](#), which correspond to the actual work performed.

Fields

Select (Sel)

Enter 1 to change the [job category](#).

This option is not available for [jobs](#) that are from [quotations](#) or those [jobs](#) that have a previously entered fixed price.

Use this to display a pop-up on which you can enter a new [job category](#).

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

Functions

Prime/Base (F14)

The transactions shown on the window are shown in the currency at the top of the window. When the window is first displayed, the currency shown is the same as the currency on the previous summary window.

Use this to change the values on the window and the literal at the top of the window to the applicable prime/base currency.

Against each transaction is a [cost](#) in base and in the currency in which it was entered. (It is possible, using purchase subcontract transactions, that the base of the [company](#) is EUR and the billing currency of the [job](#) is GBP, but the subcontract [cost](#) transaction was entered in USD.)

Also against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base.

The Prime/Base toggle allows the customer to see the [costs](#) prices in the billing currency and the base currency.

Note: *It is not possible in [Job](#) Completion to see transactions in the currency in which they were entered.*

Select **Previous (F12)** to return to the [Job](#) Completion Value Summary window.

Job Transactions Expenses Window

To display this window, enter 2 against an expenses summary line on the [Job](#) Completion Value Summary window.

This window shows a list of expenses transactions that make up the summary values shown on the previous window.

The header of the window indicates that transactions are for expenses and the selected [job/sub-job/task](#) to which they belong.

Note: *This window will be shown in the same currency as the summary window when Further Detail is selected.*

Note: *If the [job](#) is from a [quotation](#), there may be multiple lines for each [quotation](#); there will be zero [cost](#) lines that are priced, which are the quoted transactions, along with zero-priced lines with [costs](#), which correspond to the actual work performed.*

Fields

Select (Sel)

Enter 1 to change the [job category](#).

This option is not available for [jobs](#) that are from [quotations](#) or those [jobs](#) that have a previously entered fixed price.

Use this to display a pop-up on which you can enter a new [job category](#).

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

Functions

Prime/Base (F14)

The transactions shown on the window are shown in the currency at the top of the window. When the window is first displayed, the currency shown is the same as the currency on the previous summary window.

Use this to change the values on the window and the literal at the top of the window change to the applicable prime/base currency.

Against each transaction is a [cost](#) in base and in the currency in which it was entered. (It is possible, using purchase subcontract transactions, that the base of the [company](#) is EUR and the billing currency of the [job](#) is GBP, but the subcontract [cost](#) transaction was entered in USD.)

Also against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base.

The Prime/Base toggle allows the customer to see the [costs](#) prices in the billing currency and the base currency.

Note: It is not possible in [Job](#) Completion to see transactions in the currency in which they were entered.

Select **Previous (F12)** to return to the [Job](#) Completion Value Summary window.

Release for Invoicing Window

To display this window, select **Release All (F8)** or **Release Selection (F15)** on the [Job](#) Completion Value Summary window.

Use this window to select specific transactions so that the billable amount/percentage can be changed and finally release transactions for invoicing.

The window shows the details of the transaction selected on the [job](#) value summary window.

The top of the window shows:

The [job](#) number/[sub-job/task](#) at the level entered on the [Job](#) Completion Initial window

The customer number, delivery sequence, name, the [model](#), [job category](#), level 1 and 2 code details and booking dates from the level of the [job](#) selected

The currency of the transactions, the total [cost](#) and billable are also shown.

The centre of the window displays the individual transactions. Each transaction has a type.

There are five different types of transaction as follows:

Labour - This includes fixed price and T&M labour for all overtime types. For a labour transaction, Ref 1 shows the technician number and Ref 2 shows the name.

Travel - This includes fixed price and T&M travel for all travel overtime types. For a travel transaction, Ref 1 shows the technician number and Ref 2 shows the name.

Expenses - This includes any [employee expenses](#) entered via [timesheet](#) entry or stand-alone expenses entry along with any direct transactions and any subcontract (purchase) transactions. For

an expense transaction, Ref 1 shows the expense description from the [charge code](#) unless it was overtyped when the expense was entered, in which case the entered description is shown. Ref 2 shows the technician's name.

Mileage - This is any distance driven in miles or km depending on the [company](#) profile setting. These transactions are entered via [employee expenses](#) entry or the [timesheet](#) system. For a mileage transaction, Ref 1 shows the technician number and Ref 2 shows the name.

Inventory - These are parts transactions from either sales orders against the [job](#) or the Inventory Booking [task](#) within Equipment Servicing. For an inventory transaction, Ref 1 shows the [Sales Order Processing](#) order number and Ref 2 shows the part number.

For each of these, the billable amount and margin are displayed in the currency shown in the window header.

Fields

Job Category

This field displays the [job category](#) of the level of the selected [job](#).

If all the transactions on the window are for the same [job category](#), the [job category](#) is shown as available for input. You can change the [job category](#), but the new [job category](#) must be for the same [job category](#) type.

[Job category](#) types 01-03 are Field Service.

[Job category](#) types 04-08 are Workshop.

If the [job category](#) is changed, the new type (Field Service or Workshop) must be the same as the old.

It is not possible to change the [job category](#) of a [quotation](#) or a [job](#) that has a previously entered fixed price.

If the [job category](#) type is changed, the [job lines](#) on the window will be re-priced using the [cover type/job category](#) charge matrix, prices, etc. associated with the new [job category](#).

You can use the prompt facility on this field to select from the [Job Category](#) Selection pop-up.

Note: [Job category](#) type change is disabled for a Part Tax Only [job category](#)

Options

Amend

Use this against a transaction line to display the [Job](#) Transaction Values Amend window.

On return from the amendment, the window is re-displayed with the total billable and margin re-calculated with the new billable values shown. For Inventory, the [Job](#) Transaction Inventory window is shown.

Note: Amend chargeable transaction is disabled for a Part Tax Only [job category](#)

Exclude

If the Nota Fiscal engine (Parameter 65 In [General Ledger](#) country specific parameters) is switched on then it is not possible in [Job](#) Completion to transfer transactions to Pending Invoice Maintenance if combinations of different [transaction types](#) are sent through at the same time.

The mutually exclusive [transaction types](#) are:

- Chargeable Parts
- Non-Chargeable Parts
- Other Service items

If an attempt is made to transfer mixed transactions an error message will be displayed.

Major Fault Part

It is only possible to select this against a parts line.

Use this to flag the part as the originator of the need for the [job](#) (or causal part).

Functions**Invoice Text (F7)**

Use this to maintain text that will print on the invoice.

Update (F8)

Use this to take the transactions through to the invoice pending process.

It is not possible to use this if the codes have not been entered for the [job](#). You will be forced to enter codes before the transactions can go forward to invoicing.

Note: *You should ensure that you have the correct transactions ready for release prior to selecting **Update (F8)**, as once it has been selected, there is no way back to the Release for Invoicing window.*

After you have selected this function, validation will take place and the [Job](#) Final Complete window may be displayed. Alternatively, the specific transactions will just be released for invoicing.

Serial Chg (F9)

Use this to display the [Serial Number](#) Change window, which allows you to change the [serial number](#) of the equipment on this [job](#) and in the install base. See the [Installation](#) Maintenance section of this document for further details.

Peripheral (F10)

Use this to display the Equipment Configuration window, which allows users to maintain lists of peripherals against a machine. See the Maintain [Installation](#) Details section in the Customer and Equipment Database chapter of this document for further details.

Job Details (F11)

Use this to display the [Job](#) Details Enquiry window for the selected [job](#) level. For further details, see the Enquiries chapter of this product guide.

Fix Price (F13)

Use this to display the Fixed Price window. This function will not be available if the [job](#) has been created from a [quotation](#).

Note: This function is not available for a Part Tax Only [job category](#)

Prime/Base (F14)

The transactions shown on the window are displayed in the currency at the top of the window.

Use this to change the values on the window and the literal at the top of the window to the applicable prime/base currency.

Against each transaction is the selling (invoice) price in prime (of the billing customer) and the price in base. These figures are toggled when this function is used.

Name and Address (F18)

Use this to display the Override [Site](#) Address window. See the [Call](#) Logging section for further information.

Report Codes (F21)

Use this to display the Report Codes window. See the [Timesheet](#) Entry section for further details.

Parts Reporting (F22)

Use this to report additional parts against the [job](#).

Note: The parts are added against the level of the [job](#) selected on the [Job](#) Completion Initial window.

Note: Any transactions entered via the Parts Reporting function will not appear in [job](#) completion immediately, as they will have to go through the background monitor to be priced properly.

Job Story Text (F23)

Use this to enter [job](#) story text, which is held at the prime [job](#) level.

Select **Update (F8)** to accept and invoice the selected transactions.

Job Transaction Values Amend Window

To display this window, select Amend against a specific transaction on the Release for Invoicing window.

Use this window to amend the billable value or percentage against a specific transaction.

The window shows different data depending on the type of line selected.

Fields**Charge %**

Enter the new charge percentage for the transaction line.

Billable

Enter the new billable amount for the transaction line.

If either the new charge percentage or new billable amount is entered, a window is displayed, requesting a change reason code which is validated against Equipment Servicing Codes/Parameters file, type RSNC.

When the window is displayed, both the billable percentage and billable amount will be re-displayed with the new values.

Note: *It is not possible to change the billable amount on a [quotation](#) transaction or for a [job](#) that has a previously entered fixed price.*

Select **Update (F8)** to update the details and return to the Release for Invoicing window.

Serial Change Window

To display this window, select **Serial Chg (F9)** on the Release for Invoicing window.

Use this window to change the [serial number](#) for a machine.

Fields

Serial Number

Enter a new [serial number](#). This is to correct a [serial number](#) or insert one where none previously existed. You can enter individual [serial numbers](#) in line with the quantity of equipment shown.

Note: *You must run the Day End Routines [task](#) to make the change of [serial number](#) effective.*

History

Enter **1** against the [serial number](#) that holds all the previous [job](#) history. If there is more than one [serial number](#), you must enter **1** against one [serial number](#).

Press Enter to make the change.

Fixed Price Processing Window

To display this window, select **Fix Price (F13)** on the Release for Invoicing window.

Use this window to fix the price of the [job](#) for these and any future transactions.

This option is available for [jobs](#) that have not been created via [quotations](#) that do not already have a fixed price set.

Fields

Price

Enter the new price for the [job](#) transactions listed, all those that exist that are not selected and any future transactions against this [job](#). The price is entered in the currency shown.

The fixed price processing changes all the prices on the transactions for the [job](#) to be **0** and a new transaction is written for the fixed price.

Any future transactions for the [job](#) will be priced as **0**.

Any transactions that have been sent to the pending invoice files are left as they were, i.e. they are priced.

Note: *You should ensure that all priced transactions are invoiced prior to adding a fixed price to a [job](#) as if they are all invoiced together, the invoice will show some priced and some zero-priced transactions along with a fixed price line, and it may look strange.*

Select **Update (F8)** to add the fixed price to the [job](#).

Job Final Complete Pop-up

To display this pop-up, select **Update (F8)** on the Release for Invoicing window.

Use this pop-up to complete the [job](#) with optional close and release of [costs](#).

This pop-up is not always displayed. It will only be displayed if all the [tasks](#) on the [job](#) are at status 50 or if there are outstanding labour lines on the [job](#) but no outstanding sales or purchase commitments.

In all cases, by the time this pop-up is displayed, the transactions displayed on the Release for Invoicing window have been written to the pending invoice files.

The window will contain some of the possible functions, depending on the [job category](#) and [transfer method](#) of the [job](#).

Functions

Leave (F13)

This is always displayed. Use this to leave the status of the [job lines](#) selected on the [Job Completion Initial](#) window exactly the same as they were at the start of the [Job Completion task](#).

Close (F19)

This function will be displayed in the following circumstances:

If the [Transfer Method](#) for the [job](#) is **2** and it is not a warranty [job](#) (i.e. the [job category](#) type is not 03 or 04)

If the [Transfer Method](#) is not **2** or **3** or it is a warranty [job](#)

If **Close (F19)** is displayed, **Close/Release (F13)** will not be displayed.

Use this to change the status of all the non-warranty [job lines](#) selected to 99 (Everything Complete). Warranty [job lines](#) will be set to status 86 (Factory Claim Required).

Close / Release (F13)

This function will be displayed in the following circumstances:

If the [Transfer Method](#) for the [job](#) is **3** and is not a warranty [job](#) (i.e. the [job category](#) type is not 03 or 04)

Use the Close function to change the status of all the non-warranty [job lines](#) selected to 99 (Everything Complete). Warranty [job lines](#) will be set to status 86 (Factory Claim Required).

Use the Release function to set the transactions so that the [costs](#) for the [job](#) can be transferred from Work in Progress to Profit and Loss.

Select **Leave (F13)** to release the transactions for invoicing while leaving the [job](#) at the same status.

Release Jobs [10/EQS]

You use this [task](#) to select the [costs](#) or income that you want to transfer from Work in Progress to Profit and Loss or Fixed Assets.

This [task](#) does not transfer the [costs](#) or income; it prepares the data so that it is ready for transfer. Use the Transfer from [WIP tasks](#) to start the actual transfer.

Note: You can only use this [task](#) for [job](#) details with [transfer methods](#) of 2 or 3 to transfer to Profit and Loss, and 5 or 6 to transfer to Fixed Assets.

You cannot release time and materials [costs](#) until you have processed the income. You cannot release [costs](#) for capitalisation if the original GL period is greater than the current Fixed Assets period.

When you create a [job](#) with a [transfer method](#) of 2 specified, manual release of [costs](#) and revenue during the life of the [job](#) is enabled. The Manual Release function is capable of releasing part or all of the actual [job cost](#) and revenue transactions available.

Release Jobs Selection Window

To display this window, select the Release [Jobs task](#).

Use this window to select the [job](#) and level for which you want to release [costs](#) and income.

Fields

Job/Sub-job/Task

Enter the [job](#) you want to release.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Release All Levels

You can specify whether you release [cost](#) and income for the [job](#) detail only or for all the levels.

Use this checkbox as follows:

Unchecked - To release only the entered level

Checked - To release the entered level and all levels below

List Transactions

Use this checkbox as follows:

Unchecked - Not to list the transactions

Checked - To list the transactions

Functions

Confirm Request (F8)

Use this to submit the request to release [costs](#) and income.

Note: *If you include lower levels, this starts a batch-processing [job](#). This releases all available [costs](#) and incomes and produces a report of the released values and other relevant information.*

Enter or select a [job](#) number, [sub-job](#) and [task](#), **check** the List Transactions field and then **Confirm Request (F8)**. The next window displayed depends on the type of [job](#).

Release Jobs Window

To display this window, enter or select a [job](#) number, [sub-job](#) and [task](#), check the List Transactions field and then select **Confirm Request (F8)** on the Release [Jobs](#) Selection window.

Fields

Release Value

Enter the value to be released.

Note: *The value cannot be greater than the outstanding value*

Release %

A percentage value is displayed if **Change Release % (F18)** has been used to calculate the release value.

Functions

Change Release % (F18)

Use this to enter a release percentage that will be applied to all lines on the window with an outstanding value to calculate the release value.

Select **Change Release % (F18)** to display the Change Release % Maintenance pop-up.

Change Release % Maintenance Pop-up

To display this pop-up, select **Change Release % (F18)** on the Release [Jobs](#) window.

Use this pop-up to enter a release percentage.

Fields

Release %

You can enter a release percentage to be applied to all listed outstanding values to calculate the release value.

Press Enter to calculate the release values of all transactions listed.

Alternatively, select **Previous (F12)** to return to the Release [Jobs](#) window.

Transfer to P&L [11/EQS]

Use this [task](#) to transfer transactions from Work in Progress to Profit and Loss within the [General Ledger](#).

You can transfer all [costs](#) for [jobs](#) with [transfer method](#) 1, all released [costs](#) for [jobs](#) with a [transfer method](#) 2, or all released [costs](#) and income for closed [jobs](#) with a [transfer method](#) of 3.

Transfer from WIP to P&L Window

To display this window, select the Transfer to P&L [task](#).

Use this window to select the method you want to use to transfer [costs](#).

Fields

Period (YYMM)

Enter the GL period for which you want to transfer [costs](#). This defaults to the current GL period.

Periodic Transfer

Check this field to transfer all [costs](#) for all [jobs](#) with a [transfer method](#) of 1 from Work in Progress to Profit and Loss.

Transfer on Request

Check this field to transfer all released [costs](#) and income for all [jobs](#) with a [transfer method](#) of 2 from Work in Progress to Profit and Loss.

Transfer on Completion

Check this to transfer all released [costs](#) and income for all closed [jobs](#) with a [transfer method](#) of 3 from Work in Progress to Profit and Loss.

Functions

Confirm Request (F8)

Use this to transfer [costs](#) from the Work in Progress [General Ledger](#) accounts to the Profit and Loss [General Ledger](#) accounts

Select **Confirm Request (F8)** to submit the [job](#).

Progress Chasing [20/EQS]

Use this batch [job](#) to detect [job lines](#) that have a particular action for too long.

This batch [job](#) only includes actions where you have a specified number of progress chasing days.

The batch [job](#) finds all [jobs](#) with the Progress Number of Days greater than 0, and if the status is less than 08, it retrieves the [job](#) and prints a letter for each [job line](#).

The batch [job](#) also sets a flag to make sure the letter is not re-printed until the date is the current date plus the progress chasing days again.

Select Confirm **Submit (F8)** to start the batch [job](#) running.

Note: *You can also run this batch [job](#) as part of the Day End procedure.*

Stock Check Exception [21/EQS]

Use this batch [job](#) to find and print all storeroom [locations](#) where the actual items found and the application information are not the same.

Note: *To run this stock check correctly, you need a bar code-enabled download program.*

The information printed is [branch](#) specific.

This batch [job](#) reports on:

- Invalid [job](#) numbers, if the item is found but not on an active [job](#)
- Incorrect [location](#), if an item is physically at a different [location](#) to that recorded on the [installation](#) details
- Items not found, if items that should be in the workshop, according to the data, cannot be physically found

Select **Confirm Submit (F8)** to start the batch [job](#) running.

Load Planned Maintenance Jobs [30/EQS]

Use this [task](#) to convert planned maintenance schedules into actual workshop [jobs](#), with technicians assigned, for specified workshop periods in advance.

When you have added [contracts](#) during a [service period](#), select this [task](#) after running the Period End Routines [task](#). This [task](#) converts all planned maintenance [visits](#) generated for the selected periods, including the new [visits](#) extended by the latest Period End Routine run, to actual [jobs](#).

Note: *You must have exclusive use of the Equipment Servicing [company](#) to run this [task](#).*

Equipment Servicing creates the planned maintenance schedules within [Contract](#) Maintenance, at equipment line level. You must select this [task](#) to convert these schedules into actual [jobs](#).

Description

This process assigns a [job](#) number and technician (if possible) to all scheduled maintenance [visits](#) for the selected periods and adds the [job](#) to the list of outstanding open [jobs](#).

If you **check** the Customer Refs for [Contracts](#) field in the customer additional service details, the customer order number from the [contract](#) header is included in each [job](#).

This [task](#) generates either single line or multi-line [jobs](#), depending on the setting of the One Machine per PM [Job](#) field in the [company](#) profile:

- If you **checked** the field, each piece of equipment due a planned maintenance [visit](#) in a [service period](#) has its own [job](#) number.
- If you left the field **unchecked**, the [task](#) assigns one [job](#) number to each group of equipment on the same [contract](#), at the same customer [site](#), due a planned maintenance [visit](#) in the same [service period](#). Each piece of equipment forms a [job line](#) within the single [job](#).

Load Planned Maintenance Jobs Window

To display this window, select the Load Planned Maintenance [Jobs task](#).

Use this window to select the periods for which you want to create the planned maintenance [jobs](#).

Fields

From Period

Enter the [service period](#) (in YYP format) from which to begin the load of planned maintenance [jobs](#).

You can maintain the significant calendar fields and current period in the Maintain Calendar Control and Maintain Daily Calendar [tasks](#).

Until Period

Enter the [service period](#) (in YYP format) up to which you want to plan the maintenance [jobs](#). This must be no more than six periods ahead of the current period.

To submit a [job](#) to perform the load, select **Submit Job (F8)**. This does not produce a report, but the Work Control [task](#) displays the results when the batch [job](#) finishes.

Timesheet Reconciliation [31/EQS]

The software does not automatically post [timesheet costs](#) to the [job](#). Use this [task](#) to print a [timesheet](#) reconciliation report before you post transaction values to the [job](#).

This prints details on employees who have not been through the batch, or who have worked fewer than their normal weekly working hours.

You can then amend any [timesheets](#).

You can amend [timesheets](#) until you reconcile them with the Run with Update field **checked** but the [costs](#) will not be posted to the [job](#) until you run the Post Time Sheets [task](#).

Fields

Branch

This defaults to the current [branch](#) but you can enter any existing [branch](#).

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Use this value to process technicians for the whole [branch](#).

Team

You can optionally enter an existing team.

Alternatively, use the prompt facility to select from the Team Description pop-up.

Use this value to process one team of technicians,

Technician/To

You can optionally enter an existing technician.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

You can enter a range of technicians.

Period (YYMM)

Enter a valid period. Use this period to process all un-reconciled [timesheets](#) for this period and the [branch](#) or team or technician entered above. You will be told if there are no outstanding [timesheets](#) for your selection.

Date Range/To

Enter or select a valid date or date range. Use this date range to process all un-reconciled [timesheets](#) for this date range and the [branch](#) or team or technician entered above. You will be told if there are no outstanding [timesheets](#) for your selection.

Session

Enter a valid session number. Use this session number to process all un-reconciled [timesheets](#) for the session number and the [branch](#) or team or technician entered above. You will be told if there are no outstanding [timesheets](#) for your selection.

Run with Update

Leave this field **unchecked** to produce a report of un-reconciled [timesheets](#) only.

Check this field if you wish to update the [timesheets](#) as reconciled. The selected [timesheets](#) will not be processed by this [task](#) again and will be available for the Post [Timesheets task](#), when the [costs](#) will be posted to the [job](#).

Select **Submit (F8)** to start the [job](#).

Post Timesheets [32/EQS]

Use this [task](#) to post the [timesheets](#) to the relevant accounts. The software updates the [timesheet](#) transactions in batch.

Note: If you want to check the [timesheets](#), run the [Timesheet Reconciliation task](#) before you run this [task](#).

Once you are satisfied that all [timesheets](#) for a period are correct, use this [task](#) to update the Equipment Servicing files with a posting validation report and the GL files with an interface file validation report.

Select **Confirm Submit (F8)** to start the [job](#). This is a simple batch [job](#), with no parameters required.

Re-Assign Calls for a Team [33/EQS]

Use this [task](#) to re-organise the workload completely for a team. Automatic [Call](#) Assignment must be inactive.

Description

During normal running of the Automatic [Call](#) Assignment Sleeper program, Equipment Servicing attempts to shuffle the [jobs](#) already loaded, to schedule new work within target times.

Use this [task](#) to remove all [jobs](#) except despatched or appointment [jobs](#) for a selected team, and re-load the team, based on the current availability. Use this when technicians are unavailable for work after you have assigned [calls](#) to them, and you need a full refresh of the team workload.

Implications

This [task](#) does not re-assign [jobs](#) with an appointment, or despatched [jobs](#); if you want to re-assign these [jobs](#), you must do it manually.

Note: The workshop subsystem must be active and the Automatic [Call](#) Assignment Sleeper program must be inactive.

Re-Assign [Calls](#) for a Team Window

To display this window, select the Re-assign [Calls](#) for a Team [task](#).

Use this window to select the team for which you want to re-assign [calls](#).

Fields

Team

You must enter the team for which you wish to re-assign [calls](#).

Alternatively, use the prompt facility to select from the Team Description pop-up.

Equipment Servicing re-allocates all [calls](#) from the technicians in the team, except despatched and appointment [calls](#).

Select **Submit (F8)** to re-assign all the [jobs](#) for the selected team.

Re-assign Undespatched Calls [34/EQS]

Use this [task](#) to re-organise the workload completely for all teams. The Automatic [Call](#) Assignment must be inactive.

Note: *This is also run as part of the Day End Routines [task](#).*

Description

The [task](#) removes all [jobs](#), except despatched or appointment [jobs](#), for all teams and re-loads them, based on the current settings of the technicians' availability flags.

This is useful as an end of day [task](#) (and is run as part of the Day End Routines [task](#)), after you have updated technician availability for the next working day.

It also checks each technician's diary for all [tasks](#) with end dates, such as holidays. If you have passed an end date, Equipment Servicing re-sets the Absent flag on the Technician Master file to blank.

Implications

This [task](#) does not re-assign [jobs](#) with an appointment, or despatched [jobs](#). You must re-assign these [jobs](#) manually.

Note: *You must stop Automatic [Call](#) Assignment while running this re-assignment and the workshop subsystem must be active.*

Re-Assign Undespatched Calls Window

To display this window, select the Re-assign Undespatched [Calls task](#).

Use this window to submit the [call](#) re-assignment routine.

Select **Submit (F8)** to re-assign all undespatched [calls](#).

Chapter 9 Warranty Claims

Create Warranty Claim [1/EQW]

Use this [task](#) to enter a warranty claim manually. Equipment Servicing does not check any of the information entered, it just stores the record.

Equipment Servicing makes a copy of the information entered and creates a [job](#) for the warranty claim. When Equipment Servicing creates the [job](#), it checks and highlights all problems with the information.

When you maintain the warranty claim, it is the copied [job](#) you maintain. Equipment Servicing stores the original record, with all the errors, so that you can analyse it, if required.

Warranty Claim Creation Selection Window

To display this window, select the Create Warranty Claim [task](#).

Use this window to select the customer for whom you are creating a warranty claim.

Fields

Account Number

Enter the customer for whom you want to create a warranty claim or use the prompt facility.

Note: This customer must be a warranty claim [site](#). In other words, you must have set the Warranty Claim field appropriately on the Additional Details Maintenance Details window.

Address Code

Enter the customer [location](#) for which you want to create a warranty claim.

Note: If you leave the address code field blank, all [locations](#) for the selected customer are displayed.

Enter an account number and address code and then press Enter. The Customer Name and Address pop-up is displayed, on which you can change the telephone number. Press Enter to confirm you have the correct details and display the Warranty Claim Header Creation window.

Warranty Claim Header Creation Window

To display this window, press Enter on the Customer Name and Address pop-up.

Use this window to enter the warranty claim information. Once you save the information on this window, Equipment Servicing copies the information and creates a [job](#).

Note: Once you have entered and saved the initial information, you maintain the [job](#) and not the original record.

Fields

Ownership

Enter one of the following:

0 - If the warranty claim is for equipment at a customer [site](#)

1 - If the warranty claim is for equipment which is part of the dealer's stock

You can also use the prompt facility on this field to select a valid value from the Warranty Claim [Ownership](#) Code pop-up.

Claim Type

Enter one of the following:

0 - If the claim is for parts only

1 - If the claim is for labour only

2 - If the claim is for both parts and labour

You can use the prompt facility on this field to select from the Warranty Claim Code pop-up.

Job Category

Enter the [job](#) for this warranty claim.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

This defaults to the warranty claim default [job category](#).

Claim Reference

Enter a reference for the claim.

Model Number

Enter the [model](#) for which this warranty claim is being made.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial Number

Enter the [serial number](#) of the equipment.

Purchase Date

Enter or select the purchase date of the equipment.

Received for Repair

Enter or select the date on which the faulty equipment was received.

Repair Completed

Enter or select the date on which the repair was completed.

Main Area

Enter the first two levels of the fault reported by the customer.

Alternatively, use the prompt facility to select from the Main Area pop-up.

Remember that the entered codes may be not be faults but [tasks](#) that have to be performed on the [job](#). For example, the codes associated with an [installation job](#) are not fault codes.

***Note:** These two headings are soft coded and can be configured in the Codes/Parameters file, under type FLTS.*

Repair Time

Enter the length of time it took to repair the equipment, in hh:dd format.

Authorisation Number

Enter the repair authorisation number.

Extended Warranty No

Enter the number of the extended warranty.

Contract Type

Enter the type of [contract](#) that covers this equipment.

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

Start Date

Enter or select the start date of the [contract](#).

Non-Reportable

Enter one of the following:

0 (default) - If you need to report the repair

1 - If you do not need to report the repair

Functions**History (F6)**

Use this to display the history of this claim on the Warranty Claim Enquiry window.

End User (F14)

Use this to maintain the name and address details of the end user of this machine.

Original Dealer (F16)

Use this to maintain the name and address details of the original dealer of this machine.

Parts (F18)

Use this to display the Warranty Claim Parts Creation window. If there is no [installation](#) record for this machine, and the [Ownership](#) field is set to **0** (Customer), a pop-up displays for you to enter the details of where this machine is installed.

Fault Information (F21)

Use this to add fault information to the warranty claim.

Select **Update (F8)** to save the information.

Note: If you set the [Ownership](#) field to 0 (Customer) and have not entered the name and address, the End User Address Maintenance pop-up is displayed so that you can enter the customer details.

Note: If you set the Claim Type to 1 (Labour) and there are no parts associated with the claim, the Fault Information pop-up is displayed so that you can enter a reference, the faulty section, the defect and required repair for future reporting.

Warranty Claim Parts Creation Window

To display this window, select **Parts (F18)** on the Warranty Claim Header Creation window.

Use this window to enter the parts required or fitted for this warranty claim.

Fields**Part Number**

Enter the part. You must have defined this to Inventory Management.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Reference Number

Enter the reference number for this part.

Quantity

Enter the quantity required.

Received

Enter the quantity received.

Area

Enter the first two levels of the fault reported by the customer. Remember that the entered codes cannot be faults but must be [tasks](#) that have to be performed on the [job](#). For example, the codes associated with an [installation job](#) are not fault codes.

Note: These two headings are soft-coded and can be configured in the Codes/Parameters file, under type FLTS.

D

Enter the defect with this part.

R

Enter the repair required or carried out.

Invoice Number

Enter the invoice number.

Functions**History (F6)**

Use this to display the history of this claim on the Warranty Claim Enquiry window.

Dealer (F10)

Use this to enter the name and address of the dealer making the claim.

End User (F14)

Use this to maintain the name and address details of the end-user of this machine.

Original Dealer (F16)

Use this to maintain the name and address details of the original dealer of this machine.

Select **Update (F8)** to save the information.

Note: If you set the [Ownership](#) field to 0 (Customer) and have not yet entered the name and address, the End User Address Maintenance pop-up is displayed so that you can enter the customer details.

Fault Information Pop-up

To display this pop-up, select **Fault Information (F21)** on the Warranty Claim Header Creation window.

Use this pop-up to enter the fault information if you have reported no parts for this warranty [job](#).

Fields**Defect Code**

Enter the fault with this section.

Alternatively, use the prompt facility to select from the Defect/Repair Selection pop-up.

Repair Code

Enter the repair carried out.

Alternatively, use the prompt facility to select from the Defect/Repair Selection pop-up.

Reference Number

Enter a reference number for this repair.

Select **Update (F8)** to save the information and return to the previous window.

Maintain Warranty Claim [2/EQW]

Once you have created and initially validated a warranty claim, use this [task](#) to progress the claim until you either credit or reject the claim.

Warranty Claim Maintenance Selection Window

To display this window, select the Maintain Warranty Claim [task](#).

Use this window to select the warranty claim you want to progress.

Fields

Note: You can enter the [status code](#) alone or the [status code](#) and one of the other selection fields.

Status Code

Enter the status of the claim you want to progress.

Alternatively, use the prompt facility to select from the Warranty Claim Function List pop-up.

Model Hierarchy – Division

Enter the [division](#) code of the claims that you want to progress.

Alternatively, use the prompt facility to select from the [Division](#) Code List pop-up.

Model Hierarchy – Model group

Enter the [model](#) group of the claims that you want to progress. The [model](#) group will be a valid [model](#) group for the [division](#) code entered.

Alternatively, use the prompt facility to select from the [Model](#) Group List pop-up.

Model Hierarchy – Model sub group

Enter the [model](#) sub group of the claims that you want to progress. The [model](#) sub group will be a valid [model](#) sub group for the [division](#) code and [model](#) group entered.

Alternatively, use the prompt facility to select from the [Model](#) Sub Group List pop-up.

Claim Number

Enter the claim number you want to progress.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Account Number

Enter the customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Address Code

Enter the address sequence for the specified customer.

Model Number

Enter the [model](#) for the warranty claim.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial Number

Enter the [serial number](#) of the equipment.

Claim Reference No

Enter the warranty claim reference number.

Enter the selection details and then press Enter to display the Warranty Claim Maintenance window.

Warranty Claim Maintenance Window

To display this window, enter the selection details and then press Enter on the Warranty Claim Maintenance Selection window.

Use this window to maintain the selected claim. This window displays, for each claim, the claim number, [status code](#), creation date, customer and equipment details.

Fields**Select**

Enter one of the following:

- 1 - To enter a status using the [Status Code](#) pop-up
- 2 - To maintain a warranty claim using the Warranty Claim Header Maintenance window
- 3 - To display the Warranty Claim History Enquiry for this claim
- 4 - Use this to enter [job](#) story text for this warranty claim

Functions**Fold/Truncate (F13)**

Use this to toggle the display between one and two lines of information.

Select **Exit (F3)** to leave the [task](#).

Warranty Claim Header Maintenance Window

To display this window, enter 2 against a warranty claim on the Warranty Claim Maintenance window.

Use this window to maintain the header details for the selected warranty claim.

Fields

Account Number

Enter the customer name and address to which you want to send this credit.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

This customer must be a warranty claims customer defined to Equipment Servicing.

This field defaults to the customer details on the [installation](#) record.

Ownership

Enter the type of [ownership](#).

Alternatively, use the prompt facility to select from the Warranty Claim [Ownership](#) Code pop-up.

Job Category

Enter the [job category](#) as defined on the [Job Category](#) file.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Status Code

Enter a status defined for this [branch](#).

Alternatively, use the prompt facility to select from the Warranty Claim Function List pop-up.

This new status and the previous status must be a valid combination.

The initial status is created by the batch program run when you create the warranty claim.

Thereafter you must manually maintain the statuses, unless you use **Revalidate (F23)** to re-validate the entire claim.

Claim Type

Enter one of the following:

- 0 - If the claim is for parts only
- 1 - If the claim is for labour only
- 2 - If the claim is for both parts and labour

Claim Reference

Enter a reference for the claim.

Non-Reportable

Enter one of the following:

- 0 (default) - If you need to report the repair

1 - If you do not need to report the repair

Model Number

Enter the [model](#) for this claim.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Unless you enter a valid [model](#), you cannot set the status to clear for payment.

Serial Number

Enter the [serial number](#) of the equipment.

Purchase Date

Enter or select the date on which the equipment was purchased.

Ext. Warranty

Enter the number of any extended warranty.

Received for Repair

Enter or select the date on which the [branch](#) received the equipment for repair.

Contract Type

Enter the type of [contract](#) that covers this equipment.

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

Repair Completed

Enter or select the date on which you completed the repair.

Start Date

Enter or select the start date of the [contract](#).

Main Area

Enter the first two levels of the fault reported by the customer. Remember that the entered codes cannot be faults but must be [tasks](#) that have to be performed on the [job](#). For example, the codes associated with an [installation job](#) are not fault codes.

Note: These two headings are soft-coded and can be configured within the Codes/Parameters file, under type FLTS.

Authorisation Code

Enter the repair authorisation number.

Repair Time

Enter the length of time it took to repair the equipment, in HH:MM format.

Duplicate Reference

This is a memo-only field. Enter the number of previous claims made on this [model](#) and [serial number](#) combination.

Header Errors

Use this checkbox as follows:

Unchecked - To print the header errors only on the customer letters

Checked - To print both header and parts errors on the customer letters

Reject

This displays the reject reasons created by the batch program run when you created the warranty claim. You cannot remove any system-controlled reject reasons; you must correct the data to do this. You can however, add or delete user-created codes at any time.

***Note:** You can inhibit the functionality of a system-generated reason code by using the Active field.*

Active

Enter one of the following:

0 - If you do not want this reject reason used when creating prints and clearing files

1 - If you want this reject reason used when creating prints and clearing files

***Note:** You cannot clear a claim until all reject reasons are inactive. You can make the codes inactive either by correcting the data, or by setting this field to 0.*

Description

This displays the description of the reject reason.

Functions

Text (F7)

Use this to maintain text associated with this warranty claim.

Update (F8)

Use this to update the files.

If the claim is labour only, and you have no parts associated with it, a pop-up is displayed so you can enter and update the reference, machine section, and repair codes. Equipment Servicing then checks if it needs to assign any reject reasons. Once it has assigned the reject reasons, it updates the files.

Parts (F14)

Use this to add parts on the Warranty Claims Parts Maintenance window.

End User (F15)

Use this to maintain the name and address details for the end user.

Orig. Dealer (F16)

Use this to maintain the name and address details for the original dealer.

Override Address (F17)

Use this to change the [installation](#) contact and address details, using the Verify [Installation Address](#) window.

Orig Claim (F18)

Use this to display the Warranty Claim Original Data window which shows the data entered when you created the warranty claim.

Document History (F19)

Use this to display the document history for this warranty claim.

Audit (F20)

Use this to display the status of this claim on the Claim Progress pop-up.

Fault Info. (F21)

Use this to enter fault information at any time during the maintenance of the warranty claim.

History (F22)

Use this to display the Warranty Claim Enquiry.

Revalidate (F23)

Use this to re-run the validation process for this claim. Any resulting reject codes display on this window. This removes the existing reject reasons and actions but you must select **Update (F8)** to update the files.

Select **Update (F8)** to save the changes and return to the previous window.

Warranty Claims Parts Maintenance Window

To display this window, select Parts (F14) on the Warranty Claim Header Maintenance window.

Use this window to maintain the parts entered on the warranty claim. This displays the customer details and the parts on the claim. For each part, it displays the quantity, quantity returned, machine section, defect, repair required, reject reason, invoice number, and whether the item is to be paid for.

Fields**Select**

Select one of the following:

Reject Code - To display the reject reasons and whether they are active for this part

You can also add more reject reasons.

Invoice Search - To display all parts claim lines entered for any customer with this invoice number, so that you can see if the invoice is being used for multiple claims

Functions

Text (F7)

Use this to maintain text associated with the warranty claim.

End User (F15)

Use this to enter the name and address details for the end user.

Org Dealer (F16)

Use this to enter the name and address details for the original dealer.

Override Name/Address (F17)

Use this to change the [installation](#) contact and address details, using the Verify [Installation Address](#) pop-up.

Org Claim (F18)

Use this to display the Warranty Claim Original Data window which shows the data entered when you created the warranty claim.

Audit (F20)

Use this to display the status of the claim on the Claims Progress pop-up.

History (F22)

Use this to display the document history for the claim.

Select **Previous (F12)** to return to the previous window.

Verify Installation Address Pop-up

To display this pop-up, select Override Name/Address (F17) on any Warranty Claims Maintenance window.

Use this pop-up to change the details of the [site](#) where the equipment is installed.

Fields

Note: All these fields default to the values entered on the [installation](#) details.

Customer Name

Enter the customer name.

Customer Address

Enter the address.

Post Code

Enter a valid postcode

Telephone Number

Enter the telephone number for the customer.

Note: Do not change a 20-figure telephone number because Equipment Servicing loses the last 5 characters, as the override address only holds 15 numbers.

Fax Number

Enter the fax number for the customer.

Opening Hours

Enter the opening hours for the customer.

Functions

List Previous Addresses (F14)

Use this to list all previous addresses at which the [Model](#) and [Serial Number](#) have ever been recorded.

Select **Update (F8)** to save the information and return to the previous window.

Warranty Claim Original Data Window

To display this window, select **Org Claim (F18)** on any Warranty Claim Maintenance window.

This window displays the details entered when you created the warranty claim. These details include the customer name and address, claim status, equipment details, fault, and reference numbers. It also lists any parts details, including part number, description, quantity, and reference.

Options

Original Reject Codes

Use this to display the original reason for rejecting the claim.

Functions

Header Reject Codes (F16)

Use this to display all [job](#) header reject codes which are the same as those shown on the Warranty Claim Header Maintenance window. If Equipment Servicing finds no reject codes, it displays "No Records to Display".

Code Descriptions (F23)

Use this to display two lines of details for each part.

Select **Previous (F12)** to return to the previous window.

Claim Progress Pop-up

To display this pop-up, select **Audit (F20)** on any Warranty Claims Maintenance window.

This pop-up displays, for each status completed so far, the date and time of the status and the user who entered the action.

Select **Previous (F12)** to return to the previous window.

Maintain Returned Parts [10/EQW]

Use this [task](#) to maintain a list of parts that must be automatically flagged as returned, if they are on any warranty claim.

If one of these items is on a claim and you have not received it, the Equipment Servicing validation routines set the status of the claim to Awaiting Parts.

Note: *This list is not date-controlled. If the item is on the list when you run the validation routines, the status is set to Awaiting Parts.*

Parts Required for Return Maintenance Selection Window

To display this window, select the Maintain Returned Parts [task](#).

Use this window to specify a part number.

Fields

Part Number

Enter the part you want to add to the list. You can use the prompt facility on this field to select from the Item Master Scan pop-up.

Select a part or enter a part number and then press Enter to display the Parts Required for Return Maintenance window.

Parts Required for Return Maintenance Window

To display this window, select a part or enter a part number and then press Enter on the Parts Required for Return Maintenance Selection window.

Use this window to maintain the list of parts that must be returned.

Fields

Part Number

Enter the part you want to add to the list and then press Enter. The part is displayed in the table below.

You can use the prompt facility on this field to select from the Item Master Scan pop-up.

Options

Delete

Use this to select a part you want to delete from the list.

Select **Update (F8)** to save the list.

Maintain Warranty Claim Labour Credit Code [11/EQW]

Use this [task](#) to set up a table of credit rates that are specific to a credit code and currency. The credit rates are for all levels of the [model](#) hierarchy and have effectivity dates.

You can raise a credit note to credit a dealer for a fixed amount of labour or an hourly rate for the number of hours worked on the claim. The type of credit note raised depends upon the setting of the Warranty Claim field on the Additional Details Maintenance Details window.

Equipment Servicing uses this table to calculate the credit. The value used depends upon which labour rate list you entered in the Warranty Claim Labour Credit List field on the Additional Details Maintenance Details window.

During batch validation, Equipment Servicing checks this table for the relevant value if you require a labour credit, and outputs an error if the required value does not exist.

Labour Credit List Maintenance Selection Window

To display this window, select the Maintain Warranty Claim Labour Credit Code [task](#).

Use this window to select the credit code and currency for which you want to maintain labour credit values.

Fields

Warranty Claim Labour Credit Code

Enter the labour credit list you want to maintain.

Alternatively, use the prompt facility to select from the Warrant Claim Labour Credit pop-up.

Currency Code

Enter the currency code you require.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

This field defaults to the standard base currency of the [Accounts Receivable company](#).

Enter or select the details and then press Enter to display the Labour Credit Maintenance Details window.

Labour Credit Maintenance Details Window

To display this window, enter or select the details and then press Enter on the Labour Credit Maintenance Selection window.

Use this window to maintain and define labour credit values for [divisions](#), [models](#) groups, [model](#) sub-groups and [models](#).

Fields

Note: You must enter a [division](#). The [model](#), group, and sub-group fields are optional. You only need to enter a [model](#) group if you enter a [model](#) sub-group, and you only need to enter a [model](#) sub-group if you enter a [model](#).

Division

Enter the [division](#) required.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter the [model](#) group required.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Model Sub Group

Enter the [model](#) sub-group required.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

Model

Enter the [model](#) required.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Effective Date

Enter or select the date on which these credit rates become effective.

Job Category

Enter the category of [job](#) to which these rates apply.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Fixed Credit Value

Enter the value of credit for fixed credit value claims.

Hourly Credit Value

Enter the hourly rate of credit given.

Options

Select

Use this to maintain the defined credit rates.

The details are displayed in the fields at the top of the window. You can only maintain credit rates with an effective date of greater than or equal to the current date. If you have used the credit values to generate a credit note, they are kept so that you can enquire on them.

Delete

Use this to delete the defined credit rates.

You can only delete credit rates with an effective date of greater than or equal to the current date.

Select **Update (F8)** to save your entries and delete all credit rates marked for deletion.

Maintain Customer/Model Invalid Claims [12/EQW]

Use this [task](#) to create an exclusion file. The exclusion file prevents a customer from requesting warranty claims for a particular [model](#) during a particular time period.

Use this [task](#) when a dealer buys out the guarantee for a particular [model](#), [model](#) sub-group or [division](#).

Whenever Equipment Servicing validates a claim, it checks this file. If a record exists for the customer, [model](#) and date combination, Equipment Servicing rejects the claim and assigns the relevant rejection reason.

Customer/Model Claimable Maintenance Selection Window

To display this window, select the Maintain Customer/[Model](#) Invalid Claims [task](#).

Use this window to select the customer for which you want to define a [model](#) exclusion file.

Fields

Account Number

Enter the customer code.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Address Code

Enter the customer address sequence.

Note: Leave the Address Code field blank and then press Enter to display a list of all addresses for this customer. Select the required address.

Enter the customer details and then press Enter to display the Customer/[Model](#) Claimable Maintenance window.

Customer/Model Claimable Maintenance Window

To display this window, enter the customer details and then press Enter on the Customer/[Model](#) Claimable Maintenance Selection window.

Use this window to define the [models](#) and dates for which this customer cannot make warranty claims.

Fields

Note: You must enter a [division](#). The [model](#), group, and sub-group fields are optional. You only need to enter a [model](#) group if you enter a [model](#) sub-group, and you only need to enter a [model](#) sub-group if you enter a [model](#).

Division

Enter the [division](#) required.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter the [model](#) group required.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Model Sub Group

Enter the [model](#) sub-group required.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

Model Number

Enter the [model](#) required.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Date Range/To

Enter or select the date range to which this exclusion applies.

Options

Delete

Use this to delete the defined exclusion.

Select **Update (F8)** to save your changes and return to the Customer/[Model](#) Claimable Maintenance Selection window.

Batch Generation of Credit Notes [40/EQW]

Use this [task](#) to create Sales Order ([Sales Order Processing](#)) credit notes for all warranty claims cleared for credit.

This batch [job](#) can create two types of credits for each claim line, one for labour and one for parts. These are combined onto one [Sales Order Processing](#) credit note.

Processing

The batch [job](#) does the following:

- 6 It selects all claims with a status of Cleared for Credit.
- 7 It consolidates all credits for parts for one customer. This credit note does not have a stock update attached.
- 8 It values the credit. The value for parts is the price of the item on the original invoice, if this available, or the price of the item, using Advanced Pricing and the purchase date, or the repair completion date, or the claim creation date. Any discounts associated with the customer on the selected date are also included.
- 9 It consolidates all credits for labour for a customer site.
- 10 It calculates the hourly credit rate, where applicable, using the labour credit code and values defined.
- 11 It generates each line and a credit note number, which is written to the Technical Report Parts file. Labour lines are written to the credit note before the part claim lines. Text associated with the claim is the second line of the external text associated with the order.
- 12 If you created an override name and address file for the warranty claim, this is written to the override file for the invoice/credit header.
- 13 It updates the status code on the warranty claim to Payment Paid.

This batch [job](#) also prints the account summary document for the customers that require this documentation.

Select Confirm **Submit (F8)** to submit a [job](#) to perform the processing.

Chapter 10 Cost Processing

Maintain Job Detail Activity [1/EQO]

Use this [task](#) to define activities and [stage payments](#) for [job](#) details. You can also assign start and completion dates to the activities.

[Stage payments](#) are triggered when either of the following happens:

- The payment date arrives
- You complete an activities which is linked to a [stage payment](#)

You set up activities and [stage payments](#) for [quotation jobs](#). You must link [stage payments](#) to activities. Then, when you enter the [activity's](#) completion date, the [stage payment](#) is made.

Job Detail Activity Maintenance Selection Window

To display this window, select the Maintain [Job](#) Detail [Activity task](#).

Use this window to specify the [job](#) detail for which you want to maintain activities. You can enter:

- [Job](#), blank [sub-job](#), blank [task](#) to maintain activities for a [job](#)
- [Job](#), [sub-job](#), blank [task](#) to maintain activities for a [sub-job](#)
- [Job](#), [sub-job](#), [task](#) to maintain activities for a [task](#)

Fields

Job Number

Enter a [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Sub-job

Enter the [sub-job](#).

Task

Enter the [task](#).

Press Enter to display the [Job](#) Details [Activity](#) Maintenance window.

Job Detail Activity Maintenance Window

To display this window, enter the [job](#), [sub-job](#) and [task](#) number and then press Enter on the [Job Detail Activity Maintenance Selection](#) window.

Use this window to enter the [activity](#), start date and/or completion date.

Fields

Select

Select one of the following:

- More text - To enter text for the [activity](#)
- Copy text - To copy existing text from a specified [activity](#)
- You must enter the [job](#) detail and then select the [activity](#) whose text you want to copy. If only one exists, it is copied automatically.
- [Stage Payments](#) - To set up and review [stage payments](#) for this [job](#) detail on the [Stage Payment Linkage](#) window
- You must complete all activities for any one-[stage payment](#) before you can produce an invoice for that [stage payment](#).
- Delete - To delete an [activity](#)

Start Date

Enter or select the date on which you started the [activity](#).

Completion Date

Enter or select the date on which you completed the [activity](#).

Activity Code

Enter the [activity](#) code. This is optional, as the [activity](#) can be just a start date.

Text

This field displays the text for the [activity](#). You can enter more text using the **More Text** option.

Functions

Include/Exclude Complete Activities (F9)

Use this to toggle the display between showing all activities or only the incomplete activities.

Press Enter to save each changed [activity](#) and then select **Exit (F3)** to leave the [task](#).

Stage Payment Linkage Window

To display this window, select [Stage Payments](#) against an [activity](#) on the [Job Detail Task Maintenance](#) window.

Use this window to link [stage payments](#) to activities. For each [stage payment](#), this window displays the payment number, [activity](#) code, amount, and process date. It also shows whether the payment is already linked to this [activity](#) or any other [activity](#).

Fields

Select

Select one of the following:

- Link - To link this payment to the [activity](#)
- Detach- To sever the link between the payment and the [activity](#)
- Display Linked Activities - To list all activities linked to this [stage payment](#) on the [Stage Payments](#) Linked Activities window
- Text - To maintain [stage payment](#) text (you can copy in [activity](#) text)

Functions

Include/Exclude Processed Payments (F9)

Use this to toggle the display between showing all payments or only the outstanding payments.

Press Enter to save each payment and then select **Exit (F3)** to leave the [task](#).

Stage Payments Linked Activities Window

To display this window, select Display Linked Activities against an [activity](#) on the [Stage Payment](#) Linkage window.

This window displays the details of any activities linked to the [stage payment](#). For each [activity](#), the start and completion dates, [activity](#) code and basic text are displayed.

Options

Text

Use this to enter text against the [activity](#) linked to the [stage payment](#). This is for information only.

Select **Exit (F3)** to leave the [task](#).

Maintain Budget [2/EQO]

Use this [task](#) to create a [budget](#) or management forecast for any year in the Equipment Servicing base currency.

Note: *There is no functional difference between forecasts and [budgets](#).*

You can attribute multiple [budgets](#) to every [job](#) detail. You can also break each [budget](#) down by period. You can set up [budgets](#) or forecasts for any [job](#) level. The software automatically rolls up

[budgets](#) from a lower level through the [job](#) hierarchy. However, you can record a rolled-up [budget](#) at a higher level and prevent it being overwritten during the roll-up process.

You can create six [budgets](#) within one [budget](#) code:

- [Job](#)/blank/blank
- [Job](#)/[sub-job](#)/blank
- [Job](#)/[sub-job](#)/[task](#)
- [Job](#)/blank/blank/expenses
- [Job](#)/[sub-job](#)/blank/expenses
- [Job](#)/[sub-job](#)/[task](#)/expenses

Budget/Forecast Maintenance Selection Window

To display this window, select the Maintain [Budget task](#).

Use this window to enter the [budget](#) type and [job](#) level for which you want to enter details.

Fields

Budget Code and Type

In the first field, enter a [budget](#) code.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up. You have to select a [budget](#) type first.

You define these in the Maintain Codes/Parameters [task](#).

In the second field, select one of the following:

- Forecast (0) - To create or maintain a forecast
- [Budget](#) (1) - To create or maintain a [budget](#)

Job

Enter the [job](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Sub-job/Task

You can optionally enter a [sub-job](#) and [task](#).

Expense Type

If you want to [budget](#) down to [expense type](#) level, you can enter an [expense type](#).

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Start Year

Enter the year from which you want the display to begin. This will be the number of years past the year 2000. Therefore 9 is equal to 2009.

Press Enter to display the [Budget](#)/Forecast Maintenance Details window.

Budget/Forecast Maintenance Details Window

To display this window, press Enter on the [Budget](#)/Forecast Maintenance Selection window.

Use this window to enter the [budget](#) level for each period. You must enter the values in the base currency of the Equipment Servicing [company](#).

Note: If you do not need to break down [budgets](#) by period, just enter the total [budgets](#).

Fields

This Level Budget

Enter the [budget](#) for [costs](#) which are only relevant to this [job](#) level.

You can either enter a total value only, or enter a total and a value for each period. The breakdown entered does not have to agree with the total value.

Note: A [budget](#) is for a project, not for a year.

Rolled-up Budget

Enter the total [budget](#) for [costs](#) which include [budgets](#) from lower levels of the [job](#).

If you want to [budget](#) at all levels and want the software to roll up automatically through the [job](#) hierarchy, do not enter a [budget](#) here. Rolled-up [budgeting](#) works in the same way as rolled-up [cost](#) transactions.

Note: Use Page Up and Page Down to see more periods.

Pr

Enter one of the following priorities:

0 - To allow the automatic roll-up

1 - To prevent the total [budgets](#) entered from being overwritten by the automatic roll-up process

Note: If you change a [budget](#), the Variation Entry Details window is displayed so that you can record the reason for the variation.

Select **Update (F8)** to validate any update any changes made to [budgets](#).

Maintain Cost/Price List [3/EQO]

Use this [task](#) to define [cost](#) and price lists.

If you use [cost](#) and price lists, you have a very flexible means of identifying the hourly rates for [costs](#) and income. You can set up an hourly rate for each employee's grade, and a standard rate for each list. The standard rate acts as a default for zero rated grades.

You define a list by its list code, the list type ([cost](#) or price), its currency and its effective date. You can use the same code for different currencies, and the same code for the [cost](#) list and the price list.

Cost/Price List Maintenance Selection Window

To display this window, select the Maintain [Cost/Price List](#) [task](#).

Use this window to select the list you want to maintain.

Fields

List Type

Select one of the following:

- [Costs](#) - To define a [cost](#) list
- Prices - To define a price list

List Code

Enter a three-character list code.

Alternatively, use the prompt facility to select from the Select [Cost](#) List pop-up or the Select Price List pop-up.

Currency Code

Enter the currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

The currency for [costs](#) must be the base currency.

Effective Date

Enter or select the date on which the list becomes effective. This defaults to the system date.

Press Enter to display the [Cost/Price List Maintenance Detail](#) window.

Cost/Price List Maintenance Detail Window

To display this window, enter the selection criteria and then press Enter on the [Cost/Price List Maintenance Selection](#) window.

Use this window to enter the details for the [cost](#) or price list.

Note: *The description of this window depends upon the type of list selected.*

Fields

Description

Enter a description for the list.

Standard Rate

Enter a standard rate for the list. This is used whenever you have not specified an override in the list on this window. This rate is also used in labour commitment valuation.

Grade

Enter the labour grades allowed within this list. You must have defined these grades via the Maintain Codes/Parameters [task](#) and, for [cost](#) lists, the grade currency must be the same as the list currency.

You can use the prompt facility on this field to select from the Technician [Job](#) Grade pop-up.

Hourly Rate

Enter the hourly rate for the grade. This must not be negative.

Options

Delete

Use this to against a grade to delete it.

Press Enter to update the list.

Maintain Variation [4/EQO]

Equipment Servicing records variations and provides a complete audit trail of all changes to selling prices, estimated hours and [budgets](#). You can therefore produce a [Cost](#) to Complete report showing accurate original and variation values.

You can use this [task](#) to enter variations at either [job](#) detail level or [expense type](#) level.

Each variation is numbered; the original is 000, the first variation is 001, etc. Each variation has a date and records which [budget](#), if any, was affected by the change.

What is a Variation?

Not every change to a price, to hours or to a [budget](#) is a variation.

If you set up a price, hours or a [budget](#) at the start of the [job](#) with a value of zero, you change it. This change is not a variation, and the change is recorded on the original 000 record. This is because a starting point of zero is not considered to be a true value.

Any other change is recorded as a variation. The software can tell the difference between an original value of zero (that is the 000 record) and a value which has been set to zero during the course of the [job](#). Therefore, the audit trail does not overlook any variations to zero.

Variation Entry Selection Window

To display this window, select the Maintain Variation [task](#).

Use this window to select the [job](#) detail and [budget](#) for which you want to enter variations.

Fields

Job/Sub-job/Task

Enter the [job](#) detail to which the variation is to apply.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Current Budget Code

If this variation is to apply to a [budget](#), enter that [budget](#) in this field.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

Press Enter to display the Variation Entry List window.

Variation Entry List Window

To display this window, enter your selection criteria and then press Enter on the Variation Entry Selection window.

Use this window to select the variation you want to maintain. This displays the original and current value for the [budget](#), the estimated hours and the selling price. The [budget](#) is the [budget](#) entered on the Variation Entry Selection window. The estimated hours and selling price are the values for this level of the [job](#) detail.

The existing variations are listed in reverse variation number order. For each variation, as well as the [budget](#), estimated hours and selling price, the date, reference, reason and user ID are displayed. TEXT is displayed beside the user ID if there is any text for the variation.

Select

Use this to display or enter text.

Functions

Add Variation (F6)

Use this to add a new variation on the Variation Entry Details window.

By Expense Type (F9)

Use this to enter a variation for an [expense type](#). The Variation Entry [Expense Types](#) window is displayed.

Select **Add Variation (F6)** to display the Variation Entry Details window.

Variation Entry Details Window

To display this window, select **Add Variation (F6)** on the Variation Entry List window.

Note: This window is displayed automatically when you change a [budget](#) at [job](#) detail or [expense type](#) level within the Maintain [Budget task](#), or change selling prices or estimated hours within [job](#) maintenance.

Use this window to enter the new details for the [budget](#), estimated hours or selling price. The current value is displayed for the [budget](#), estimated hours and selling price.

Note: The exact fields displayed depend on the kind of variation you are entering.

Fields

Budget Code

Enter the [budget](#) for which you want to maintain variations.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

This field defaults to the [budget](#) entered on the Variation Entry Selection window or on the [Budget/Forecast](#) Maintenance Selection window.

New Value

Enter the new value for the [budget](#), hours or price. You cannot enter a percentage change if you enter a new value.

Percentage Change

Enter a percentage change for the [budget](#), hours or price. If you do so, you must leave the New Value field blank, as the software calculates the new value.

Update Budget Code

Enter the [budget](#) to update with the variation.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

This field is only displayed if you are entering [budget](#) variations, or if you are entering estimated hours variations and your [job](#) is set up as maintaining labour [budgets](#) from estimated hours.

Date

Enter or select the variation date. This defaults to the current date.

Reference

Enter a variation reference.

Reason

Enter a reason code for the variation.

Alternatively, use the prompt facility to select from the [Variation Reason Code](#) pop-up.

Functions

Maintain Period Budgets (F16)

You can only use this if you have changed the [budget](#) value. Use this to maintain the [budget](#). The [Budget/Forecast](#) Maintenance Details window is displayed. For more information, refer to the Maintain [Budget](#) section.

Press Enter to save the details and display the Variation Entry List window.

Variation Entry Expense Types Window

To display this window, select By [Expense Type \(F9\)](#) on the Variation Entry List window.

Use this window to select the [expense type](#) for which you want to maintain a variation. This window displays the original and current value for the [budget](#), estimated hours and selling price. For each [expense type](#), the original and current [budgets](#) are displayed. If any variations exist for this [expense type](#), the word Variations is displayed alongside the current [budget](#) value.

Options

Select

Use this to display the variations for an [expense type](#) on the Variation Entry [Expense Type](#) Details window.

Select an [expense type](#) to display the Variation Entry [Expense Type](#) Details window.

Variation Entry Expense Type Details Window

To display this window, select an [expense type](#) on the Variation Entry [Expense Type](#) window.

Use this window to select the variation you want to maintain. This displays the original and current value for the [budget](#), estimated hours and the selling price. The [budget](#) is the [budget](#) entered on the Variation Entry Selection window. The estimated hours and selling price are the values for this [expense type](#).

The existing variations are listed in reverse variation number order. For each variation, as well as the [budget](#), estimated hours and selling price, the date, reference, reason and user ID are displayed. TEXT is displayed beside the user ID if there is any text for the variation.

Options

Text

Use this to add or amend text.

Functions

Add Variation (F6)

Use this to add a new variation for this [expense type](#). The Variation Entry Details window is displayed.

Press Enter to save the details and re-display the Variation Entry List window. Then select **Exit (F3)** to leave the [task](#). A message informs you that a batch [job](#) has been submitted.

Maintain Accrual [5/EQO]

The accruals process will allow an estimation system to be run for all equipment on usage-based [contracts](#) (these always bill in arrears) and produce an estimate of the likely revenue bill for the period. This is a simple calculation and does **not** perform full reconciliation billing where pre-billing, credit notes and free copies are taken into account.

It is only a guide for actual usage [contracts](#) as to the revenue expected in the next [billing period](#).

An estimated value can then be manually entered by the user, where required, and an accrual transaction generated.

The process is as follows

- The user accesses the [task](#) and is presented with a window listing all equipment on all usage-based [contracts](#) that are due to bill before or on the date shown.
- Before display, each piece of equipment has an estimated reading generated for the date entered and for each reading the estimated charge is calculated.
- The user can then manually enter a value against each line and for each line entered, an accrual posting is generated.
- If an accrual posting is generated, an audit record is written to a new file and this prevents a further selection of this piece of equipment for this date (or any earlier date) by this [task](#).
- Also, if an accrual is posted, two accrual movement records are created; the first contains details of the posting in the current GL period and the second contains details of the reverse posting in the following GL period.
- These accrual movement records are processed by the [AFI](#) application.

Accrual Initial Window

To display this window, select the Maintain Accrual [task](#).

Use this window to maintain the accruals for the [company](#).

Options

Select

Use this to display the Accruals Amendment window.

Conditions

Use this to display the appropriate [Contract Conditions](#) window. See the Maintain [Contract](#) section in the [Contracts](#) Database chapter of this product guide for further details.

Meter History

Use this to display the Meter History Enquiry. See the Enquire on [Contracts](#) section in the Enquiries chapter of this product guide for further details.

Invoice History

Use this to display the [Contract](#) Billing History window. See the Enquire on [Contracts](#) section in the Enquiries chapter of this product guide for further details.

Select **Update (F8)** to generate the accruals.

For each entry with an accrual value listed, the records are written for the accruals and to prevent another accrual being posted for the same period.

Accruals Amendment Window

To display this window, select a specific [contract](#) line on the Accrual Initial window.

Use this window to maintain the accrual value against a [contract](#).

Fields

Accrual Value

Add the accrual value that you wish to post for the metered [contract](#).

Press Enter to save the details and re-display the Accrual Selection window.

Maintain Job Category/Labour Price List [6/EQO]

This allows an override labour price list to be entered for a specific [job category](#) or for a [job category](#)/customer combination.

These are part of the labour price list hierarchy.

The hierarchy is:

- [Contract Conditions](#)
- [Contract](#) Equipment
- [Contract](#) Header
- [Job Category](#)/Customer
- [Job Category](#)
- Customer
- [Model](#)
- [Model](#) Sub-group
- [Model](#) Group
- [Division](#)
- [Branch](#)
- [Company](#)

Job Category/Labour Price List Window

To display this window, select the Maintain [Job Category/Labour Price List task](#).

Use this window to specify the [job category](#) for which the labour price overrides are to be set.

Fields

Job Category

Enter a valid [job category](#) to maintain.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Press Enter to display the [Job Category/Labour Price List](#) window.

Job Category/Labour Price List Detail Window

To display this window, enter or select a [job category](#) and then press Enter on the [Job Category/Labour Price List](#) window.

The window lists all account number/[site](#) records for this [job category](#) in account number/[location](#) code/descending effective start date sequence and allows you to maintain the details.

Fields

Select

Enter one of the following:

1 - To amend the account details

This will move the selected line to the bottom of the window for amendment.

4 - To select an account for deletion

Account

Enter a valid account number and address sequence for which to add an override.

Alternatively, use the prompt facility on the first field to select from the Customer Scan pop-up.

If this field is left blank, the override is for the [job category](#) for all customers.

List

Enter a valid override labour price list.

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

Note: If the [company](#) is set to grade-based labour pricing, the lists shown on the prompt are from the Maintain [Cost/Price Lists task](#). If the [company](#) is set to rate-based labour pricing, the lists shown on the prompt are from the Maintain Labour Price Lists [task](#).

Start

Enter or select a date for the commencement of the override.

This date must be before the end date.

End

Enter or select a date for the end of the override.

This must be after the start date.

It is not possible to have two overrides for the same customer or [job category](#) that overlap. Therefore it may be necessary to add an end date to an existing record before a new record is added.

Functions

Position List (F17)

Use this to select a specific customer and have the list positioned at that customer.

Select **Update (F8)** to validate any changes made to the overrides and perform the updates.

Copy Cost/Price List [8/EQO]

Use this [task](#) to create new [cost](#) or price lists by copying existing ones.

You can apply a percentage change to the values so that, for example, the new list rates are 3.5% higher than those of the original list.

The software displays the results so that you can make any amendments before confirming the copy.

Copy Cost/Price List Window

To display this window, select the Copy [Cost/Price List task](#).

Use this window to specify the source and destination list and the percentage uplift.

Fields

List Type

Select one of the following:

- [Costs](#) (1) - To copy a [cost](#) list
- Prices (2) - To copy a price list

From List Code

Enter the existing list from which to copy.

Alternatively, use the prompt facility to select from the Select [Cost](#) List pop-up or the Select Price List pop-up.

Currency Code

Enter the currency of the source list.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Effective Date

Enter or select the effective date of the source list.

To List Code

Enter a three-character code for the new list.

Alternatively, use the prompt facility to select from the Select [Cost](#) List pop-up or the Select Price List pop-up.

Effective Date

Enter or select the effective date of the new list.

Description

Enter a description for the new list. If you leave this field blank, the description from the original list is used.

Percentage Uplift

To alter all the figures in the old list by a given percentage, enter that percentage in this field. A positive figure increases the rates; a negative figure decreases them.

To enter a negative, enter a negative sign after the value, for example 10-.

Press Enter to create the new list. A message is displayed when the copy is complete. The [Cost/Price List Maintenance Detail](#) window is displayed so that you can amend and confirm the details. (For more information, refer to the Maintain [Cost/Price List](#) section).

Note: When you see the details on the [Cost/Price List Maintenance Detail](#) window, the new list has already been created. You can only delete it by selecting **Delete (F11)**.

Initiate Cost to Complete [10/EQO]

Use this [task](#) to submit a batch [job](#) that updates all the standard commitment values, and clears all existing data from the [Cost](#) to Complete files.

This also clears all existing [budget](#) values from the [budget](#) you specify on the selection window. Every [job](#) included in the [cost](#) to complete calculations then has its [job](#) details and [expense type](#) data copied into the [Cost](#) to Complete files.

Use the Maintain [Cost](#) to Complete [task](#) to record the calculation information in the files that you prepare using this [task](#).

Cost to Complete Initiation Window

To display this window, select the Initiate [Cost](#) to Complete [task](#).

Use this window to specify the selection criteria and submit the initiation [job](#).

Fields

Budget to be Used for Standard Cost Calculations

Enter the [budget](#) to hold the output of the standard [cost](#) calculations.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

Budget Type (Untitled)

Enter the [budget](#) type.

Budget to be Used for Recording Cost to Complete Calculations

Enter the [budget](#) to hold the output of the [cost](#) to complete calculations.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

If you choose a [budget](#) which you have already used for recording variations, the software displays a warning: "This [budget](#) is closed during initiation".

Budget Type

You must enter a [budget](#) type in order to use the prompt on the previous field.

To Run CTC Initiation for a Single Job

Enter a [job](#) if you want to run [cost](#) to complete initiation for a single [job](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Note: Leave this field and the To Run CTC Initiation for a Single CTC Code field blank to include all [jobs](#) which have a [cost](#) to complete code against them.

To Run CTC Initiation for a Single CTC Code

Enter a code if you want to run [cost](#) to complete initiation for [jobs](#) with a certain [cost](#) to complete code.

Alternatively, use the prompt facility to select from the [Budget](#) Code pop-up.

Press Enter to submit the [job](#).

Maintain Cost to Complete [11/EQO]

Use this [task](#) to record [cost](#) to complete calculation information.

This is stored in the files which are prepared when you run the Initiate [Cost](#) to Complete [task](#). You can use this information in [cost](#) to complete reporting.

Cost to Complete Maintenance Selection Window

To display this window, select the Maintain [Cost](#) to Complete [task](#).

Use this window to select the [job](#) details for which you want to maintain [Cost](#) to Complete details.

Fields

Job/Sub-job/Task

Enter the [job](#) detail to which the [cost](#) to complete calculations are to apply.

Alternatively, use the prompt facility to select from the Select [Cost](#) to Complete [Job](#) Detail pop-up.

If the All Levels field is **unchecked**, this [job](#) detail must be open.

All Levels

Use this checkbox as follows:

Unchecked - Not to apply entries made at this level to all lower levels

Checked - To apply entries made at this level to all lower levels

By Expense Type

Use this checkbox as follows:

Unchecked - To enter maintenance for material and other direct [costs](#) at [job](#) detail level

Checked - To enter maintenance for material and other direct [costs](#) at [expense type](#) level

Functions

Labour (F15)

Use this to display the labour [cost](#) details and enter the method used to calculate the [cost](#) to complete. The [Cost](#) to Complete Maintenance Labour window is displayed.

Materials (F16)

Use this to display the material [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on this window. If you left it **unchecked**, the Material by [Job](#) Detail window is displayed. If you **checked** it, the Material by [Expense Type](#) window is displayed.

Other Direct (F17)

Use this to display the other direct [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on this window. If it is **unchecked**, the Other Direct by [Job](#) Detail window is displayed. If it is **checked**, the Other Direct by [Expense Type](#) window is displayed.

Enter the selection criteria and then select **Labour (F15)** to display the [Cost](#) to Complete Maintenance Labour window.

Note: All of the detail windows display the values in the [cost](#) to complete files. When you enter new values, the original values on the window are replaced by new ones, but the actual files are not updated until you select **Update (F8)**.

Cost to Complete Maintenance Labour Window

To display this window, select **Labour (F15)** from any window within the Maintain [Cost](#) to Complete [task](#).

Use this window to display the labour [cost](#) to complete details. This displays this level and rolled up values for:

- Estimated hours
- Actual hours
- [Cost](#) to complete
- Percentage complete

Fields

Job/Sub-job/Task

To display the details for another [job](#), enter the [job](#) detail.

Alternatively, use the prompt facility to select from the Select [Cost](#) to Complete [Job](#) Detail pop-up.

All Levels

Use this checkbox as follows:

- Unchecked - Not to apply entries made at this level to all lower levels
- Checked - To apply entries made at this level to all lower levels

Method

Enter one of the following to indicate the method used to calculate the [cost](#) to complete:

1 - Finish [budget](#) on time

Use this method when the recorded labour hours are a true representation of the actual work achieved and you expect the [job](#) to continue at the same level of efficiency.

Hours to complete = Estimated hours - Actual hours

Note: You cannot select lower level methods if you checked the All Levels field on the [Cost](#) to Complete Maintenance Selection window.

2 - Continue at same level of efficiency

Use this method when the standard hours achieved is different from the actual hours recorded and you expect the efficiency achieved so far to continue at the same rate. You must enter the standard hours achieved.

Hours to complete = ((Estimated hours x Actual hours) / Standard hours achieved) - Actual hours

3 - Complete at standard rate

Use this method when the standard hours achieved is different from the actual hours recorded, but you expect the level of efficiency to return to normal for the rest of the [job](#). You must enter the standard hours achieved.

Hours to complete = Estimated hours - Standard hours achieved

4 - Enter degree of inefficiency to apply to rest of [job](#)

Use this method when you cannot calculate from history the degree of inefficiency to apply to the rest of the [job](#). You must enter the standard hours achieved and the degree of inefficiency.

Hours to complete = (Estimated hours - Standard hours achieved) x Percent inefficient

5 - Enter degree of efficiency to apply to rest of [job](#)

Use this method when you cannot calculate from history the degree of efficiency to apply to the rest of the [job](#). You must enter the standard hours achieved and the degree of efficiency.

Hours to complete = (Estimated hours - Standard hours achieved) x Percent efficient

6 - Enter hours to complete manually

You can use the prompt facility on this field to select from the Select Labour Methodology pop-up.

Note: Depending on the method selected, the following fields could be for display only.

Estimated Hours

These are the estimated labour hours for the [task](#) either derived from a template or from a [quotation](#).

Actual Hours

These are the actual hours booked on the project so far. The labour hours only become actual hours once they have been reconciled via the [Timesheet Reconciliation task \[31/EQS\]](#) and posted via the [Post Timesheets task \[32/EQS\]](#).

Percentage Inefficient

For method 4, enter a positive level of inefficiency to apply to the rest of the [job](#).

Percentage Efficient

For method 5, enter the positive level of efficiency to apply to the rest of the [job](#).

Standard Hours Achieved

For methods 2, 3, 4 and 5, enter the number of standard hours achieved so far. For example, if you have recorded 30 actual hours, but only achieved 25 hours' worth of output, enter 25.

This cannot be negative, and must be greater than zero for method 2.

Hours to Complete

For method 6, enter the number of hours required to complete the [job](#).

Cost to Complete

This is calculated from the entered hours to complete.

Percentage Complete

This is calculated as the (actual hours / (actual hours + hours to complete)) * 100.

Functions

Materials (F16)

Use this to display the material [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on the [Cost](#) to Complete Maintenance Selection window. If you left this **unchecked**, the Material by [Job](#) Detail window is displayed. If you **checked** it, the Material by [Expense Type](#) window is displayed.

Other Direct (F17)

Use this to display the other direct [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on the [Cost](#) to Complete Maintenance Selection window. If you left it **unchecked**, the Other Direct by [Job](#) Detail window is displayed. If you **checked** it, the Other Direct by [Expense Type](#) window is displayed.

Enter the new values and then press Enter. The new [cost](#) to complete details are displayed.

When you are sure the values are accurate, select **Update (F8)** to save them.

Material by Job Detail Window

To display this window, leave the By [Expense Type](#) field unchecked on the [Cost](#) to Complete Maintenance Selection window and then select **Materials (F16)** from any window within the Maintain [Cost](#) to Complete [task](#).

Use this window to display the material [cost](#) to complete details. This displays the this-level and rolled-up values for:

- [Budgets](#)
- Commitments
- Actual hours
- [Cost](#) to complete

Fields

Job/Sub-job/Task

To display the details for another [job](#), enter the [job](#) detail.

Alternatively, use the prompt facility to select from the [Cost](#) to Complete [Job](#) Detail pop-up.

All Levels

Use this checkbox as follows:

Unchecked - Not to apply entries made at this level to all lower levels

Checked - To apply entries made at this level to all lower levels

Method

Enter one of the following to indicate the method to calculate the [cost](#) to complete:

1 - Based on commitment

Use this method when the [cost](#) to complete is the outstanding value of [job](#) commitments. You can apply this at all lower levels.

[Cost](#) to complete = Purchase commitments + Inventory commitments

2 - Based on original estimate

Use this method to base the [cost](#) to complete on the original [budgets](#). You must enter manually a variance percentage, a variance value, or a standard [cost](#) achieved. You can apply this to all lower levels.

3 - Enter revised estimate

Use this method when the materials already recorded are a true representation of the actual work achieved and you expect the [job](#) to continue at the same level of efficiency.

Material [costs](#) to complete = Estimated material [costs](#) - Actual material [costs](#)

You can use the prompt facility on this field to select from the displayed pop-up.

Note: Depending on the method selected, the following fields could be display only:

Budget Cost

This is the [budget](#) either entered via the Maintain [Budget task](#) [2/EQO] or derived from the [quotation](#).

Commitment Cost

This is the total [committed costs](#) from active [Sales Order Processing](#) orders.

Budget Cost

This is the total actual [cost](#) from despatched [Sales Order Processing](#) orders or manually entered items in the **Parts Reporting task** [2/EQB].

Standard Cost Achieved

For method 2, enter the standard material [costs](#) achieved so far. For example, if you have recorded actual [costs](#) of 30 pounds, and achieved 25 pounds' worth of output, enter 25.

This must be greater than zero.

Variance Value

For method 2, enter the value variance of material [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Variance Percentage

For method 2, enter the percentage variance of material [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Cost to Complete

For method 3, enter the total [cost](#) to complete.

Functions

Labour (F15)

Use this to display the labour [cost](#) details and enter the method used to calculate the [cost](#) to complete. The [Cost to Complete Maintenance Labour](#) window is displayed.

Other Direct (F17)

Use this to display the other direct [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on the [Cost to Complete Maintenance Selection](#) window. If you left this field **unchecked**, the Other Direct by [Job](#) Detail window is displayed. If **checked** it, the Other Direct by [Expense Type](#) window is displayed.

Enter the new values and then press Enter. The new [cost](#) to complete details are displayed.

When you are sure the values are accurate, select **Update (F8)** to save them.

Material by Expense Type Window

To display this window, check the By [Expense Type](#) field on the [Cost to Complete Maintenance Selection](#) window and then select **Materials (F16)** from any window within the Maintain [Cost to Complete](#) [task](#).

Use this window to maintain the material [cost](#) to complete details by [expense type](#).

Fields

Job/Sub-job/Task

To display the details for another [job](#), enter the [job](#) detail. Alternatively, use the prompt facility to select from the [Cost to Complete](#) [Job](#) Detail pop-up.

Mth

Enter one of the following to indicate the method to calculate the [cost](#) to complete:

1 - Based on commitment

Use this method when the [cost](#) to complete is the outstanding value of [job](#) commitments. You can apply this at all lower levels.

[Cost](#) to complete = Purchase commitments + Inventory commitments

2 - Based on original estimate

Use this method to base the [cost](#) to complete on the original [budgets](#). You must enter manually a variance percentage, a variance value, or a standard [cost](#) achieved. You can apply this at all lower levels.

3 - Enter revised estimate

Use this method when the materials already recorded are a true representation of the actual work achieved and you expect the [job](#) to continue at the same level of efficiency.

Material [costs](#) to complete = Estimated material [costs](#) - Actual material [costs](#)

You can use the prompt facility on this field to select from the Select Material Methodology pop-up.

Note: Depending on the method selected, the following fields might be display only:

Variance %

For method 2, enter the percentage variance of material [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Variance Value

For method 2, enter the value variance of material [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Standard Cost Achieved

For method 2, enter the standard material [costs](#) achieved so far. For example, if you have recorded actual [costs](#) of 30 pounds, and achieved 25 pounds' worth of output, enter 25.

This must be greater than zero.

Cost to Complete

For method 3, enter the total [cost](#) to complete.

All Levels

Enter one of the following:

- 0 - Not to apply this [cost](#) to lower levels
- 1 - To apply this [cost](#) to all levels

Functions

Labour (F15)

Use this to display the labour [cost](#) details and enter the method used to calculate the [cost](#) to complete. The [Cost](#) to Complete Maintenance Labour window is displayed.

Other Direct (F17)

Use this to display the other direct [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on the [Cost](#) to Complete Maintenance Selection window. If you left this field **unchecked**, the Other Direct by [Job](#) Detail window is displayed. If you **checked** it, the Other Direct by [Expense Type](#) window is displayed.

Enter the new values and then press Enter. The new [cost](#) to complete details are displayed.

When you are sure the values are accurate, select **Update (F8)** to save them.

Other Direct by Job Detail Window

To display this window, leave the By [Expense Type](#) field unchecked on the [Cost to Complete Maintenance Selection](#) window and then select **Other Direct (F17)** from any window within the Maintain [Cost to Complete task](#).

Use this window to display the other direct [cost](#) to complete details. This displays the this-level and rolled up values for:

- [Budgets](#)
- Commitments
- Actual hours
- [Cost to complete](#)

Fields

Job/Sub-job/Task

To display the details for another [job](#), enter the [job](#) detail.

Alternatively, use the prompt facility to select from the [Cost to Complete Job](#) Detail pop-up.

All Levels

Use this checkbox as follows:

- Unchecked - Not to apply entries made at this level to all lower levels
- Checked - To apply entries made at this level to all lower levels

Method

Enter one of the following to indicate the method to use to calculate the [cost](#) to complete:

1 - Based on commitment

Use this method when the [cost](#) to complete is the outstanding value of [job](#) commitments. You can apply this to all lower levels.

[Cost](#) to complete = Purchase commitments + Inventory commitments

2 - Based on original estimate

Use this method when you want to base the [cost](#) to complete on the original [budgets](#). You must enter a variance percentage, a variance value, or a standard [cost](#) achieved. You can apply this to all lower levels.

3 - Enter revised estimate

Use this method when the direct [costs](#) already recorded are a true representation of the actual work achieved and you expect the [job](#) to continue at the same level of efficiency.

Other direct [costs](#) to complete = Estimated other direct [costs](#) - Actual other direct [costs](#)

Note: Depending on the method selected, the following fields might be display only.

Standard Cost Achieved

For method 2, enter the standard other direct [costs](#) achieved so far. For example, if you have recorded actual [costs](#) of 30 pounds, and achieved 25 pounds' worth of output, enter 25.

This must be greater than zero.

Variance Value

For method 2, enter the value variance of other direct [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Variance Percentage

For method 2, enter the percentage variance of other direct [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Cost to Complete

For method 3, enter the total [cost](#) to complete.

Functions**Labour (F15)**

Use this to display the labour [cost](#) details and enter the method used to calculate the [cost](#) to complete. The [Cost](#) to Complete Maintenance Labour window is displayed.

Materials (F16)

Use this to display the material [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on the [Cost](#) to Complete Maintenance Selection window. If you left this field **unchecked**, the Material by [Job](#) Detail window is displayed. If you **checked** it, the Material by [Expense Type](#) window is displayed.

Enter the new values and then press Enter. The new [cost](#) to complete details are displayed.

When you are sure the values are accurate, select **Update (F8)** to save them.

Other Direct by Expense Type Window

To display this window, check the By [Expense Type](#) field on the [Cost](#) to Complete Maintenance Selection window and then select **Other Direct (F17)** from any window within the Maintain [Cost](#) to Complete [task](#).

Use this window to maintain the other direct [cost](#) to complete details for each [expense type](#).

Fields**Job/Sub-job/Task**

To display the details for another [job](#), enter the [job](#) detail.

Alternatively, use the prompt facility to select from the [Cost](#) to Complete [Job](#) Detail pop-up.

Mth

Enter one of the following to indicate the method to use to calculate the [cost](#) to complete:

1 - Based on commitment

Use this method when the [cost](#) to complete is the outstanding value of [job](#) commitments. You can apply this to all lower levels.

[Cost](#) to complete = Purchase commitments + Inventory commitments

2 - Based on original estimate

Use this method when you want to base the [cost](#) to complete on the original [budgets](#). You must enter a variance percentage, a variance value, or a standard [cost](#) achieved. You can apply this to all lower levels.

3 - Enter revised estimate

Use this method when the direct [costs](#) already recorded are a true representation of the actual work achieved and you expect the [job](#) to continue at the same level of efficiency.

Other direct [costs](#) to complete = Estimated other direct [costs](#) - Actual other direct [costs](#)

You can use the prompt facility on this field to select from the Select Other Direct Methodology pop-up.

***Note:** Depending on the method selected, the following fields could be display only.*

Variance %

For method 2, enter the percentage variance of other direct [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Variance Value

For method 2, enter the value variance of other direct [cost](#) against standard [cost](#) achieved. This value cannot be negative.

Standard Cost Achieved

For method 2, enter the standard other direct [costs](#) achieved so far. For example, if you have recorded actual [costs](#) of 30 pounds, and achieved 25 pounds' worth of output, enter 25.

This must be greater than zero.

Cost to Complete

For method 3, enter the total [cost](#) to complete.

All Levels

Enter one of the following:

- 0 - To apply this [cost](#) only to this level
- 1 - To apply this [cost](#) to all levels

Functions

Labour (F15)

Use this to display the labour [cost](#) details and enter the method used to calculate the [cost](#) to complete. The [Cost to Complete Maintenance Labour](#) window is displayed.

Materials (F16)

Use this to display the material [cost](#) details and enter the method used to calculate the [cost](#) to complete. The window displayed depends on the By [Expense Type](#) field on the [Cost to Complete Maintenance Selection](#) window. If you left this field **unchecked**, the Material by [Job Detail](#) window is displayed. If you **checked** it, the Material by [Expense Type](#) window is displayed.

Enter the new values and then press Enter. The new [cost](#) to complete details are displayed.

When you are sure the values are accurate, select **Update (F8)** to save them.

Maintain Standing Costs [20/EQO]

You can use [standing costs](#) for journal entry, or as a direct route to allocate [costs](#) that you would otherwise enter as direct transactions.

Use [standing costs](#) to simplify the posting of regular [costs](#) against a [job](#). For example, you can set up rent of machinery as a standard [cost](#) with a fixed [expense type](#), [transaction type](#), currency details and [charge code](#).

Instead of using direct transactions to enter these [costs](#), you can set up a standing reference and enter the amount. Each standing reference has an associated set of [job](#) numbers.

You can set up [standing costs](#) as reversible. When you post amounts as reversible, you must reverse them out later.

Example

If you need to run a report of [costs](#) incurred to date, but you still have not entered certain details, such as a disputed invoice not yet processed, you can enter these [costs](#) here. Then run the report and reverse the [costs](#) back out when you process the actual [cost](#). For the purpose of the report, you enter the [cost](#) as a [standing cost](#) to make the report more timely and accurate.

Maintain Standing Costs References Window

To display this window, select the Maintain [Standing Costs task](#).

Use this window to enter the [standing cost](#) references. For each existing reference, the line number, reference, description, revision, currency and rate code are displayed.

Fields

Line

Enter number of the line you want to change or delete.

Leave this field blank if you are entering a new reference.

Standing Ref

Enter a unique reference.

Description

Enter a description for the reference, using a maximum of 35 characters.

Reverse

Use this checkbox as follows:

Unchecked - If you do not want to reverse the [costs](#)

Checked - If you want to reverse this [cost](#) later

Currency

Enter the [cost](#) currency for the transaction generated for this reference.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Rate Code

Enter the rate code used for currency conversion.

Alternatively, use the prompt facility to select from the Select Rate Code pop-up.

Expense Type

Enter the [expense type](#) to use for all transactions generated for this reference.

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

You must enter an [expense type](#) which is valid for the associated [job](#) type. You cannot use employee-related [expense types](#), such as the [expense type](#) uniquely attributed to [timesheet](#) and [employee expenses](#) transactions.

Transaction Type

Enter the [transaction type](#) for all transactions generated for this reference.

Alternatively, use the prompt facility to select from the [Transaction Types](#) pop-up.

Charge Code

Enter the [charge code](#) for all transactions generated for this reference. Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

Enter the reference details and then press Enter to save the information and display the Maintain [Standing Costs Jobs](#) window.

Maintain Standing Costs Jobs Window

To display this window, enter the reference details and then press Enter on the Maintain [Standing Costs](#) References window.

Use this window to specify the [jobs](#) associated with the selected [standing cost](#). For each existing [job](#), the line number, [job](#) number and description are displayed.

Fields

Line

Enter the number of the line you want to maintain or delete. If you are adding a [job](#) number, leave this field blank.

Job/Sub-job/Task

Enter the [job](#) number to attach to this [standing cost](#).

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

You can have a number of [job](#) numbers set against each [standing cost](#). For example, if you have a [standing cost](#) reference set up for general rent payments, you could apportion the rent across different [job](#) numbers within a [job](#) header.

Note: *You do not enter any default amount. You enter the amounts individually using the Post [Standing Costs task](#).*

Functions

Delete Whole Reference (F11)

Use this to delete the whole [standing cost](#) reference, rather than just a line.

Select **Accept (F8)** to update any changes.

Post Standing Costs [21/EQO]

Use this [task](#) to enter [standing costs](#) periodically against one or more [jobs](#).

Before you use this [task](#), you must define the [standing cost](#) reference using the Maintain [Standing Costs task](#).

Note: *You can only enter one [standing cost](#) reference at a time.*

Post Standing Costs List Window

To display this window, select the Post [Standing Costs task](#).

Use this window to post a [standing cost](#). For each [standing cost](#), the reference, description, date of last posting and currency are displayed.

Fields

Post Period

Enter the posting period. This defaults to the GL posting period.

Doc Date

Enter the document date. This defaults to the system date.

Options

Post

Use this to select a reference to post a [standing cost](#). You can then enter [cost](#) values on the Post [Standing Cost](#) Values window.

Select Post against a line to display the Post [Standing Costs](#) Values window.

Post Standing Costs Values Window

To display this window, select Post against a line on the Post [Standing Costs](#) Lists window.

Use this window to enter the posting value for the selected [standing cost](#).

Fields

Value

Enter the posting value for each [job](#). Leave this field blank to make no posting to a [job](#).

Control Amount

Enter the control amount. This must equal the total of the postings entered.

Select **Accept (F8)** to save the details and post the [costs](#).

Reverse Standing Costs [22/EQO]

Use this [task](#) to reverse out previously posted [standing costs](#).

Note: You must have checked the Reverse field on the Maintain [Standing Costs](#) References window and used the Post [Standing Costs task](#) to post a [cost](#).

Reverse [Standing Costs](#) List Window

To display this window, select the Reverse [Standing Costs task](#).

Use this window to select the [standing cost](#) you want to reverse. For each reversible [cost](#), the reference, description, Equipment Servicing posting session number and posted date are displayed.

Fields**Post Period**

Enter the posting period. This defaults to the GL posting period.

Doc Date

Enter the document date. This defaults to the system date.

Options**Post**

Use this to reverse a posted [cost](#).

Select Post against a line to display the Reverse [Standing Costs](#) Values window.

Reverse Standing Costs Values Window

To display this window, select Post against a line on the Reverse [Standing Costs](#) Lists window.

This window displays the details of the posted [cost](#). These details include:

- [Standing cost](#) reference
- Currency
- Posting period
- Document date
- [Job](#) number and description
- Value

Select **Accept (F8)** to reverse the [costs](#).

Chapter 11 EFA – EQ – FA Interface

Equipment Servicing and Fixed Assets

When you use Fixed Assets with Equipment Servicing, you can use [costs](#) captured for a [job](#) detail to create a fixed asset. You can transfer the asset from Equipment Servicing to Fixed Assets using Equipment Servicing Fixed Asset Processing. This initially posts all [costs](#) to a work in progress [General Ledger](#) account.

Note: To use the Fixed Assets interface, you must install the advanced edition of Fixed Assets.

Equipment Servicing Company Profile

The following fields in the [company](#) profile relate to fixed assets:

- Fixed Assets Active
- Parent/Child Relationship

Job Details with Transfer Methods 4, 5 or 6

If you want to create an asset from a [job](#) number, you must set the [transfer method](#) on the [job](#) detail. The valid [transfer methods](#) are from 0 to 7, but only 4, 5, and 6 create assets.

- Use [transfer methods](#) 4, 5 and 6 for [jobs](#) that are totally capital-orientated, that is, which involve creating fixed assets with capitalised values based on [costs](#) entered against [jobs](#).

You normally associate one [job](#) detail with one asset, but special conditions apply for serial-controlled Inventory item [costs](#). You can associate any asset number with any number of [job](#) details.

Transfer from WIP to Fixed Assets

You can transfer [costs](#) from [WIP](#) to Fixed Assets for [job](#) details with a [transfer method](#) of 4, 5, or 6. You process the transfer using the following [tasks](#), in this sequence:

14 Validate Transfer

You specify which assets you want to transfer. This [task](#) submits a [job](#) that produces a report of assets ready for transfer. You check that all the assets you want are there.

15 Confirm Transfer

When you are happy with the report, confirm that those are the assets you want transferred.

16 Release Automatic Transfers

This [task](#) transfers the asset details to the [General Ledger](#).

If you take a [task](#) out of sequence, a message is displayed warning you of this.

Note: If any assets are not included in the report after running the Validate Transfer [task](#), make any necessary changes to the [jobs](#), run the Restart Transfer [task](#) to re-start the transfer process and then re-run Validate Transfer.

Job Details Maintenance Pop-up [3/EQS]

Use this pop-up to enter [cost](#) to complete and Fixed Asset details for the [job](#).

Fields

Asset Number

Enter an asset number to create or amend within Fixed Assets when you transfer the [cost](#) for this [job](#) detail.

Asset Group

Enter an existing asset group.

Alternatively, use the prompt facility to select from the Select Asset group pop-up.

Depreciation Rate

Enter the depreciation rate. This overrides, for this [job](#) detail and asset group, the default depreciation rate recorded against depreciation methods not equal to 004.

Depreciation Life

Enter the depreciation life. This overrides, for this [job](#) detail and asset group, the default depreciation life recorded against depreciation methods not equal to 004.

Multiple Assets

Use this checkbox as follows:

Unchecked - To capitalise all [costs](#) for a [job](#) detail to one asset

Checked - To create multiple assets

Use this for serial-controlled Inventory items only. The asset name is truncated to 11 characters (left justified), and the software automatically generates sequential numbering for the last 4 characters. No embedded blanks are allowed.

For example:

The asset number ABCDEFGHIJKLMNO is truncated to ABCDEFGHIJK and the numbers created are ABCDEFGHIJK0001 and ABCDEFGHIJK0002

If the asset number is ABCD, the resulting numbers are ABCD0001 and ABCD0002

Cost to Complete

Enter a [cost](#) to complete reason code.

Alternatively, use the prompt facility to select from the [Cost](#) to Complete Code pop-up.

Cost to Complete Methodologies

Labour

Enter the default method for labour in [cost](#) to complete as follows:

- 1 - Finish [budget](#) on time
- 2 - Continue at same level of efficiency
- 3 - Complete at standard rate
- 4 - Input the degree of inefficiency to apply to rest of [job](#)
- 5 - Input the degree of efficiency
- 6 - Enter hours to complete

You can use the prompt facility on this field to select from the Select Labour Methodology pop-up.

Material

Enter the default method for materials in [cost](#) to complete as follows:

- 1- Based on commitments
- 2 - Based on original estimate
- 3 - Enter revised estimate

You can use the prompt facility on this field to select from the Select Material Methodology pop-up.

Other Direct

Enter the default method for other direct [costs](#) in [cost](#) to complete as follows:

- 1 - Based on commitments
- 2 - Based on original estimate
- 3 - Enter revised estimate

You can use the prompt facility on this field to select from the Select Other Direct Methodology pop-up.

Note: At the time of capitalisation, the software does not capitalise any non-serial-controlled Inventory item [costs](#), it writes them to the [General Ledger](#) write-off account (as specified in the EC [AFI](#) dictionary).

Note: If you change the [transfer method](#) from 4, 5 or 6 to a value other than 4, 5 or 6, the fixed asset data is cleared for the [job](#) detail.

Select **Update (F8)** to save the details and return to the [Job](#) Details Maintenance window.

Validate Transfer [1/EQF]

Use this [task](#) if you have [job](#) details that have transactions holding [costs](#) related to a fixed asset. These [job](#) details must have a [transfer method](#) of 4, 5 or 6.

This [task](#) does not transfer any information; it produces a report of all [job](#) details which have asset information that is ready to be transferred.

This [task](#) produces three reports:

- **Asset Creation Report** - This lists every asset that will be created if the Confirm Transfer [task](#) is run.
- **Asset Posting Report** - This lists the [costs](#) posted to Fixed Assets.
- **Exception Report** - This reports on any errors that will arise during the creation or amendment of fixed assets.

Once you have run this [task](#), you should check the reports to ensure that all the fixed assets you want to create are included. If anything is missing you must:

- Make any changes to [job](#) details to ensure that all details are picked up for transfer.
- Run the Restart Transfer [task](#). If you omit this, you cannot re-run the Validate Transfer [task](#).
- Re-run the Validate Transfer [task](#).

When you are happy with the results in the report, you must:

- Run the Confirm Transfer [task](#) to confirm that you want the details transferred.
- Run the Release Automatic Transfers [task](#) to perform the transfer itself.

Transfer from WIP to Fixed Assets Window

To display this window, select the Validate Transfer [task](#).

Use this window to specify the [transfer methods](#) for which you want to verify details.

Fields

Select (Untitled)

Check the [transfer method](#) you want to select.

Start Capitalisation Date/Period

Enter or select the start date or enter the period for each [transfer method](#). The software checks that the date and period are in the currency year.

Start Depreciation Date/Period

Enter or select the start date or enter the period for each [transfer method](#). The software checks that the date and period are in the currency year.

Select **Confirm Request (F8)** to submit a batch [job](#) to perform the validation.

Confirm Transfer [2/EQF]

Use this [task](#) to confirm that you want to post transactions to the [General Ledger](#) and Fixed Assets. Before you run this [task](#), you must select the transactions you want to post using the Validate Transfer [task](#).

Check the reports produced by the Validate Transfer [task](#). If they contain all the details you want to transfer, run this [task](#) to confirm, and then the Release Automatic Transfers [task](#) to transfer.

This [task](#) carries out the following processes:

- Posts to [General Ledger](#)
- Updates Fixed Assets
- Produces a summary report

General Ledger Posting

The [General Ledger](#) posting occurs in two parts:

- **Part A** - Credits the [WIP](#) account of the original debit, and debits the Fixed Asset suspense account specified in the [company](#) profile
- **Part B** - Credits the GL account specified in the credit mask of the [cost](#) book, in Fixed Assets

We recommend that you set this to the same value as the Fixed Asset suspense account.

Debits as the debit mask of [cost](#) book in Fixed Assets

These use [task](#) level 090.

Note: *Part B does not happen for reversible, or reversing, [standing cost](#).*

This batch [job](#) updates the following GL data:

- Posts to the GL period that is the current FA period
- Creates a GL transaction of type RC

Note: *When you create you Equipment Servicing [company](#), the software automatically creates [task](#) level 090 as an ACTY reference code, which is the standard [General Ledger](#) account type.*

Fixed Asset Update - New Asset

The way in which this batch [job](#) updates Fixed Assets depends upon whether the asset already exists. If the asset does not exist, the batch [job](#) creates the following data in Fixed Assets:

Data Field	Source
Asset number	Job details
Document date	System date
Period	Current period (FA company profile)
Reason	Job detail
Description (reason)	Description of reason code from job detail
Description (asset)	Description of the job detail used to create the asset

Parent asset	This is blank if you set the Parent/Child field in the company profile to 0. If you set it to 1, this is the asset number of the job details parent. If the job detail has a task value, this is the asset number of the job/sub-job .
Reference	The job , sub-job and task (separated by a blank) of the job detail used to initially create the asset
Model	If you create multiple assets, this is the Inventory item number.
Serial number	Serial number of Inventory item
Quantity	The accumulation of all quantities of transactions relating to this asset This is only meaningful if the transactions are all similar.
Location	The description of the job detail location
Date acquired and date commissioned	Capitalisation start date or current date (if earlier)

Analysis Types

The batch [job](#) creates the analysis types and codes for an asset according to the rules defined in the Analysis Type Mapping file.

Financial Details

Data Field	Source
Cost book	Asset group associated with job detail
Asset cost	Transaction cost (base value)
Capitalisation date/period	Selection window
Life (periods)	From job detail or from asset group associated with job detail
Retirement period	Calculated from Life
Replacement value	Transaction cost (base value)
Valuation date	Current date
Disposal date	Zero

Depreciation Book Data

The software holds this data for each depreciation book held against the asset group associated with the [job](#) detail.

Data Field	Source
Depreciation book	Asset group associated with job detail
Depreciation flag	1 (Yes)
Book value	Same as total asset cost

Max. per period	Same as total asset cost
Start date or period	Selection window
Depreciation method	Asset group associated with job detail
Depreciation rate	Asset group associated with job detail
Depreciation life	Asset group associated with job detail

Fixed Asset Update - Existing Asset

The way in which this batch [job](#) updates Fixed Assets depends upon whether the asset already exists. If the asset exists, the batch [job](#) updates the following data in Fixed Assets:

Base Details

Data Field	Source
Quantity	Transaction quantity added to the existing asset quantity

Financial Details

Data Field	Source
Asset cost	Transaction cost (base value) added to the existing asset transaction cost
Replacement	Transaction cost (base value) added to the existing replacement value

Depreciation Book Data

The software holds this data for each depreciation book held against the asset group associated with the [job](#) detail:

Data Field	Source
Maximum per period	Transaction cost (base value) added to the existing maximum per period

Select **Confirm Submit (F8)** to start the batch [job](#).

Release Automatic Transfers [3/EQF]

Use this [task](#) after running the Validate Transfer and Confirm Transfer [tasks](#).

This [task](#) transfers all the asset details confirmed using the Confirm Transfer [task](#) to Fixed Assets.

Select **Confirm Submit (F8)** to start the batch process.

Note: This [task](#) does not release any [cost](#) posted to a GL period ahead of the current Fixed Assets period.

Restart Transfer [4/EQF]

You only need to use this [task](#) if you are dissatisfied with the report produced when you run the Validate Transfer [task](#). If so, you must:

- Make any changes to [job](#) details to ensure that all details are picked up for transfer.
- Run the Restart Transfer [task](#). If you omit this, you cannot re-run the Validate Transfer [task](#).
- Re-run the Validate Transfer [task](#).

When you are happy with the results in the report, you must:

- Run the Confirm Transfer [task](#) to confirm that you want the details transferred.
- Run the Release Automatic Transfers [task](#) to perform the transfer itself.

This [task](#) re-sets the transactions back to the state before you ran the Validate Transfer [task](#) and, optionally, to the state before you ran the Release Automatic Transfers [task](#).

Restart Fixed Asset Transfer Window

To display this window, select the Restart Transfer [task](#).

Fields

Transfer Method 4 Jobs

Use this checkbox as follows:

Unchecked - Not to reverse the release of [job](#) transactions with [transfer method](#) of 4

Checked - To reverse the release of [job](#) transactions with [transfer method](#) of 4

Note: After you run this [task](#), you must run the Validate Transfer and the Release Automatic Transfers [tasks](#) again.

Select **Confirm Restart (F8)**.

Maintain Asset Groups [11/EQF]

Use this [task](#) to record Fixed Assets data that you want to hold against more than one [job](#) detail.

If you use the Fixed Asset interface, there are two primary areas of additional maintenance in Equipment Servicing. This is the first of these; the second is Analysis Type Mapping.

Asset Groups Update Selection Window

To display this window, select the Maintain Asset Groups [task](#).

Use this window to enter the details for the asset groups.

Fields

Asset Group

Enter the six-character asset group code.

Alternatively, use the prompt facility to select from the Select Asset Group pop-up.

Press Enter to display the Asset Groups Update Detail window.

Asset Groups Update Detail Window

Fields

Asset Group Description

Enter the description.

Cost Book

Enter the Fixed Asset book to use as a [cost](#) book. The software uses this to generate [General Ledger](#) asset [cost](#) accounts. Without a [cost](#) book, you cannot post values to the [General Ledger](#).

You can use the prompt facility on this field to select from the Select Book pop-up.

Book

Enter the Fixed Asset book to use as a depreciation book. You use these to control the [company's](#) assets financially. You must enter at least one depreciation book per asset group.

You can use the prompt facility on this field to select from the Select Book pop-up.

Method

Enter a depreciation method for each depreciation book. Equipment Servicing uses the standard Fixed Assets rules for depreciation methods.

You can use the prompt facility on this field to select from the Select System Reference Code pop-up.

Rate

Enter a percentage depreciation rate. Leave this field blank if you are using depreciation method 004, which depreciates in equal amounts over the asset life.

Life

Leave this field blank unless the depreciation method is 004.

If the depreciation method is 004, enter the life value in periods.

Press Enter to save any additions or amendments.

Maintain Analysis Type Mapping [12/EQF]

Use this [task](#) to create analysis codes automatically in Fixed Assets for the required analysis types.

To do this, you map Equipment Servicing data, such as [job](#) details, the [job](#) header, transactions, customer details, and Inventory item details, into Fixed Assets.

You can then analyse Equipment Servicing-related assets in Fixed Assets, according to the parameters of Equipment Servicing.

Note: This is similar to the way in which Equipment Servicing and Advanced Financial Integrator build masks to translate one code into another.

Caution: The Fixed Asset interface analysis codes are not related to the analysis codes set up in Equipment Servicing, using the Analysis Codes task. You set up these Fixed Asset codes within Fixed Assets, using the System Reference Codes task, under the reference code ANTY.

Analysis Type Mapping List Window

To display this window, select the Maintain Analysis Type Mapping [task](#).

This window lists all the existing analysis type codes in Fixed Assets. There is one line for each code.

You use this window to identify, for each analysis type, the way in which the interface creates the Fixed Asset analysis code for each analysis type.

Fields

Where the analysis code is a known value:

Analysis Code

Enter the known value.

Alternatively, use the prompt facility to select from the Select System Reference Detail Code pop-up.

Note: Do not use the EQ Field, Test, Value 1 or Value 2 fields.

More

Check this box to display more details on the Analysis Type Mapping Details window.

If you have defined more detail for a line, an asterisk is displayed.

Where the analysis code is the same as a known [job](#) detail field:

EQ Field

Enter the [job](#) header or detail field whose value you want to put into the analysis code.

Alternatively, use the prompt facility to select from the Select Analysis Type EQ Field pop-up.

Note: Do not use the Analysis Code, Test, Value 1 or Value 2 fields.

More

Check this box to display more details on the Analysis Type Mapping Details window.

If you have defined more detail for a line, an asterisk is displayed.

Where the analysis code is the same as part of a known [job](#) detail field:

EQ Field

Enter the [job](#) header or detail field part of whose value you want to put into the analysis code.

Alternatively, use the prompt facility to select from the Select Analysis Type EQ Field pop-up.

Note: Do not use the Analysis Code fields

Test

Select SST, for sub-string.

Value 1

Enter the starting position of the required data. This cannot be greater than length of the data field.

If you enter data, in either Value 1 or 2, greater than the field length of the EQ field, the software ignores the extra data characters. The combination of Value 1 and 2 must not mean that the extracted data is outside the field's limits.

Therefore, if Value 1 (start at) is 2 and Value 2 (length) is 6, you cannot enter JMNO in the EQ field, since JMNO is only 6 characters long.

Value 2

Enter the length of the required data.

More

Check this box to display more details on the Analysis Type Mapping Details window.

If you have defined more detail for a line, an asterisk is displayed.

Where the analysis code depends upon the value of a [job](#) detail field:

Analysis Code

Enter the known value that is dependent on a particular EQ field value.

Alternatively, use the prompt facility to select from the Select System Reference Detail Code pop-up.

EQ Field

Enter the [job](#) header or detail field whose value you want to check.

Alternatively, use the prompt facility to select from the Select Analysis Type EQ Field pop-up.

Test

Enter or select the test value. This can be: EQ (equal), NE (not equal), LT (less than), GT (greater than) or RANGE.

Value 1

Enter the first value. If you specified **Range** in the Test field, this is the beginning of the value range.

***Note:** If you enter data in either Value 1 or 2 greater than the field length of the chosen EQ field, the software ignores the extra data characters.*

Value 2

If you specified **Range** in the Test field, enter the end of the value range. Otherwise, leave this field blank.

More

Check this box to display more details on the Analysis Type Mapping Details window.

If you have defined more detail for a line, an asterisk is displayed.

Check the More field and then press Enter to display the Analysis Type Mapping Details window.

Valid Entries for the EQ Field

These are the [job](#) header and details fields available for mapping:

S/L Customer Names File

- Customer Group Code 1
- Customer Group Code 2
- Customer Group Code 3
- Customer Group Code 4
- Country Code

EQ Customer Details

- Region

Job Header

- Nominal Account

Cost Movement File

- [Job](#) Number
- [Sub-job](#) Number
- [Job Task](#) Number
- [Job Category](#)
- [Job](#) Discipline

- [Branch](#)
- [Expense Type](#)

[Charge Code](#)

- [Transaction Source](#)
- Internal/External [Job](#)
- Movement Type

Job Line File

- Engineer Number
- Fault Code
- Section Code
- [Cover Type](#)
- Account Number
- Instruction Code

Analysis Type Mapping Details Window

To display this window, check the More field on the Analysis Type Mapping List window.

Note: *You cannot enter an analysis type; all the data entered relates to the analysis type you selected on the first window.*

Use this window if an extra test is required for this analysis type. The first line of this window is the entry for the analysis type, from the previous window.

Fields

Analysis Code

Enter the relevant code.

Alternatively, use the prompt facility to select from the Select System Reference Detail Code pop-up.

EQ Field

Enter the relevant EQ field.

Alternatively, use the prompt facility to select from the Select Analysis Type EQ Field pop-up.

Test

Select the test. This cannot be SST.

If you want to specify a catch-all for any data that does not meet the tests specified, enter CATCH, and leave the analysis code as the default value. Leave the other fields blank.

Value 1

Enter the value as appropriate.

Value 2

Enter the value as appropriate.

Note: *Take care when entering data on this window, as the actual mapping process tries each test in turn, in the sequence specified. It stops at the first successful test.*

Select **Update (F8)** to save these details. The Analysis Type Mapping List window is displayed.
Select **Update (F8)** again to save all the changes.

Chapter 12 Inventory Processing

Post Inventory Issues [1/EQB]

Use this [task](#) to post inventory issues to Equipment Servicing.

You can post customer issues, miscellaneous issues or both. You only need to use this [task](#) if you do not use the batch processes to post inventory issues.

The batch process includes:

The direct posting interface is a batch process when you post [costs](#) (that is, a sales order) through to Equipment Servicing.

Postings are made as a result of 3-way matching, without any windows being displayed.

Direct Posting Interface Batch Submit Window

To display this window, select the Post Inventory Issues [task](#).

Use this window to specify that type of issues you want to post through to Equipment Servicing.

Fields

Customer Issues

This field is only displayed if you left the Post Customer Issues Direct field **unchecked** in the [company](#) profile.

Use this checkbox as follows:

Unchecked - If you do not want to post customer transactions

Checked - To post customer transactions

Miscellaneous Issues

This field is only displayed if you left the Post Miscellaneous Issues Direct field **unchecked** on the [company](#) profile.

Use this checkbox as follows:

Unchecked - If you do not want to post miscellaneous transactions

Checked - To post miscellaneous transactions

Select **Submit (F8)** to submit the [job](#). A pop-up will be displayed, telling you that your [job](#) has been submitted for processing.

Parts Reporting [2/EQB]

You can use this [task](#) to perform further stock issues or stock returns on inventory items against specific [jobs](#).

All stock transactions processed are added into the [costs](#) of the [job](#) and are shown in [job](#) completion for invoicing.

Parts Reporting Selection Window

To display this window, select the Parts Reporting [task](#).

Use this window to select the [job](#) for which you want to display the part details.

Fields

Job/Sub-job/Task

Enter the [job](#) on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

It is not possible to maintain parts against a [job](#) if the status of the [job](#) is greater than 90, i.e. if the [job](#) is completed, invoiced or cancelled.

It is not possible to maintain parts against the prime [job](#).

Press Enter to display the Parts Reporting Detail window.

Parts Reporting Detail Window

To display this window, enter a [job](#) number and then press Enter on the Parts Reporting Selection window.

Use this window to view and amend the parts details on the [job](#).

It may be used to issue, return or adjust parts on a [job line](#). It is possible to issue a new part or issue more of a part already issued or return a part already issued. The despatched quantity plus the adjusted quantity is equal to quantity of the part actually used on the [job line](#).

Stock can be returned to a different stockroom from the stockroom from which it was issued. It is not possible to return more stock to a stockroom than was issued from all used stockrooms. The total quantity of a part used on the [job line](#), across all stockrooms, cannot be negative.

The window shows details of any parts already associated with the [job](#).

To make a sundry booking against one of the existing lines, select the row to bring the order line and part number to the input fields at the bottom of the window and enter in an adjustment quantity.

To make a new sundry booking for a part not already listed, enter the new part number in the input field at the bottom of the window.

Fields

Line

This field displays the sales order line number. When a row is selected for posting a sundry booking, the line number is shown at the bottom of the window.

If the line number is blank, it indicates that a part has been issued against the [task](#) by a sundry parts booking and not via a sales order.

Part Number

This field displays the list of parts on the [task](#). When a row is selected for posting a sundry booking, the part number is shown at the bottom of the window.

Required

This field displays the quantity originally required.

Where the line number is blank, indicating that a part that has been issued against the [task](#) by a sundry parts booking and not via a sales order, this quantity required is zero.

Despatched

This field displays the quantity despatched so far.

Where the line number is blank, indicating that a part that has been issued against the [task](#) by a sundry parts booking and not via a sales order, this quantity despatched is zero.

Adjustments

This field displays the sum of adjustments or returns to the despatched quantity. A downward adjustment or return is shown as a negative.

Billed

This field displays the quantity billed so far.

UoM

This field displays the quantity's unit of measurement.

Stockroom (SR)

For a part not yet sourced this field displays the supply point stockroom (the customer's stockroom). For a part that has been sourced, or despatched, this field displays the sourcing point stockroom (the stockroom from which the goods are despatched).

Users are able to enter adjustments against existing parts and/or add transactions for other parts that may have been fitted on [site](#) while the technician was there.

It is also possible to enter returns of parts that have already been booked against a [job](#). For example, the template may say that 3 of a part are required but when the technician arrives, only 1 is used. In this case, the other 2 will be returned and a minus transaction will be written on the [job](#).

Options

Select

Use this to select a line for posting a sundry booking.

Return

Use this to select a line for return processing. It is not possible to select a line for return that does not have a positive value for despatched quantity plus adjustment quantity for all lines for this part number, as there must be stock available for return.

Adjustment Details

Use this to select a line for which to display the Adjustments Detail Enquiry window showing all the stock movements that have been performed for this part/stockroom.

Input Fields

Part Number

Enter a part number for a part not already listed.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

When you are selecting an existing part from the list, the part number and line number are displayed, but they cannot be overtyped.

Type

Enter one of the following valid sundry parts booking [transaction types](#).

R (Return) - To return a part that was despatched on a supply order

This generates a Miscellaneous Receipt.

I (Sundry Issue) - To issue a part that was not on the supply order

A (Adjustment) - To book an adjustment to a despatched or issued quantity, and therefore the quantity billed

This is likely to be used to correct a previous sundry booking that was mis-keyed.

Z - To allow the recording of parts on a [job](#) (and possibly to invoice the customer for) but not to perform a stock movement

Use this to record parts filled by a subcontractor.

You can use the prompt facility to select from the SUNP Parts Reporting Trans. Types pop-up.

Quantity

Enter the quantity being booked. The quantity entered is assumed to be in the unit of measure shown.

The quantity is normally entered as a positive value.

When you press Enter, the adjustment total for the line is updated, a return and a negative adjustment being treated as a negative in the adjustment total.

Returns can only be accepted for stock that has been despatched on a sales order.

Defect/Repair

This allows entry of the defect/repair code that is most applicable to the part. These codes are maintained in the Maintain Defect Code [task](#), which links the defect code to the corresponding repair codes.

You can use the prompt facility on this field to select from the Defect/Repair Selection pop-up.

Major

This allows a part to be flagged as the causal or major part, i.e. the part that caused the [job](#) to be required.

UoM

This field displays the unit of measure for the quantity. For a despatched line this is the ordered unit. For a new part being added, it is always the item's issue unit.

SR

This field displays the stockroom in which the parts are being adjusted.

For an existing line, this defaults to the parts stockroom and is then input protected.

For a new part, the stockroom must be entered. There is no default.

You can use the prompt facility on this field to select from the Stockroom Selection pop-up.

Functions

More Detail (F13)

Use this to show more detail against the line.

It shows:

Item Description (Untitled)

This field displays the part's description.

Order Line Status (Untitled)

This field displays a suspension reason if the order is suspended; otherwise it shows the current status of the order line. Where only a portion of the line has been progressed, the status shown reflects the portion that has progressed the furthest.

Outstanding - If the line is outstanding and has not been sourced

Sourced - If the line or part of the line has been sourced and a supply committed

Available to Pick - If there is stock allocated on this line and so is available to pick

On Pick - If the line, or part of the line, has been released on a pick note

Despatched - If the line, or part of the line, has been despatched

Invoiced - If the line, or part of the line, has been invoiced

Cancelled - If the line has been cancelled

Complete - If the line is complete

Apply Defect/Repair Code Defaults (F17)

Use this to display a pop up requesting the defect/repair codes that will be applied to all parts shown on the window.

Fill in the input fields at the bottom of the window and then press Enter to transfer to the Record Stock Adjustment window. For further information, see the Inventory Management product guide. Press Enter to process the movement.

When the movement has been processed, select **Exit (F3)** to leave the [task](#).

Adjustments Detail Enquiry Window

To display this window, select Adjustment Details against a line on the Parts Reporting Detail window

The window allows you to view all transactions performed against the part on this [job line](#).

Fields

Transaction Date

This field displays the adjustment transaction date.

Transaction Quantity

This field displays the transaction quantity; returns will be displayed as negative.

Cost

This field displays the transaction [cost](#).

Select **Previous (F12)** to return to the Parts Reporting Detail window.

Chapter 13 Quotations

Maintain Quote [1/EQG]

Use this [task](#) to maintain quotes.

You cannot use this [task](#) to create a new [quotation](#); they are created within the [Call Logging task](#).

When a [quotation](#) is created within [call](#) logging, it is created with records that correspond to those for parts, labour and subcontract from the template. When Maintain Quote [task](#) is used for the first time, those records are priced and the [costs](#) are calculated, so that when the Detail window is displayed initially, the price and [costs](#) are correct according to the detail on the template.

The [quotation](#) can then be manipulated until the [job](#) structure is as required.

Once you are happy for the [quotation](#) to be issued, it can be printed and sent to the customer.

Once the customer accepts the [quotation](#), it should be converted to a [job](#). This will cause the [costs](#) to be transferred into the [budget](#) fields on the [job](#) and special transaction records for the quoted selling prices to be created.

As the new [job](#) is processed, the transactions written will hold actual [costs](#) only as the [quotation](#) revenue will be as created from the special transactions created at [quotation](#) acceptance/conversion.

Quotation Maintenance Selection Window

To display this window, select the Maintain Quote [task](#).

Use this window to select the quote and revision you want to maintain.

The current [branch](#) name is displayed at the top of the window and if the new Restricted Quote [Branch](#) Access flag is set to **1** on the **Equipment Servicing Codes Maintenance option [2/EQU]** codes / then a Function key, to allow the user to change [Branch](#), is enabled.

Fields

Quote

Enter the [quotation](#) number.

Alternatively, use the prompt facility to select from the Select Quote Header pop-up.

Revision

Enter the revision level.

Alternatively, use the prompt facility to select from the Select Revision Level pop-up if more than one revision exists.

Functions**Change Branch (F9)**

Use this to [call](#) the [branch](#) selection panel to display a list of [branches](#) that you are authorised to.

Copy (F10)

Use this to copy the details of an existing quote. The Copy [Quotation](#) pop-up is displayed.

Press Enter to display the Quote Details Maintenance window.

The selected [quotation](#) has its status changed to 11.

Copy Quotation Pop-up

To display this pop-up, select **Copy (F10)** on the [Quotation](#) Maintenance Selection window.

Fields**From Revision**

Enter the revision number on which you wish to base the new revision.

Alternatively, use the prompt facility to select from the Select Revision Level pop-up.

To Quotation/Revision

This field defaults to the next revision number for the [job](#) you are copying.

Copy All Details

This field displays **1**, which means copy all details.

This includes all [expense types](#) and transaction details.

Functions**Copy (F10)**

Use this to make the copy. The [Quotation](#) Build Work with Details window is displayed.

Select **Copy (F10)** to make the copy and display the [Quotation](#) Build Work with Details window.

Quotation Build Work with Details Window

To display this window, select a quote from the [Quotation](#) Maintenance Selection window. Alternatively, select **Copy (F10)** on the Copy [Quotation](#) pop-up.

This window lists all the [job](#) details. The first row in this list always shows the [quotation](#) header. For each [job](#) detail, the description, total [cost](#), price and margin are displayed.

Note: *If running in the Invoice in Alternate currency mode (i.e. INVALTCUR limit set to '1' in Inventory default description) and if the Customers prime currency is not equal to base currency the header total price and total margin will be displayed as 0.*

Options

Enter one of the following:

1 - To display the Add [Sub-job](#) window

For details of this window, refer to the [Call](#) Logging section in the Equipment Servicing Operations chapter of this product guide.

2 - To display the Add [Task](#) window

For details of this window, refer to the [Call](#) Logging section in the Equipment Servicing Operations chapter of this product guide.

3 - To display the Maintain Details window

For details of this window, refer to the [Call](#) Logging section in the Equipment Servicing Operations chapter of this product guide.

4 - To delete any [sub-job](#) and associated [tasks](#) for a [quotation](#)

If you delete a [sub-job](#), this deletes that [sub-job](#) and any associated [tasks](#). If you delete a [task](#), this only deletes the [task](#).

5 - To display the Parts window

For details of this window refer to the [Call](#) Logging section in the Equipment Servicing Operations chapter of this product guide.

Within the Maintain Quote [task](#), it is not possible to create a sales order for the required parts, or not possible until the [quotation](#) has been converted into a [job](#).

It is not possible to use this option against a subcontract or expenses line.

6 - To maintain any expenses for a [job](#), [sub-job](#) or [task](#) on the Work with Expenses window

It is not possible to use this option against a parts or subcontract line.

7 - To maintain any subcontract expenses for a [job](#), [sub-job](#) or [task](#)

It is not possible to create a purchase order for any subcontract [costs](#) until the [quotation](#) is converted to a [job](#).

It is not possible to use this option against a parts or expenses line.

The Subcontract window is displayed. For details of this window, refer to the [Call](#) Logging section in the Equipment Servicing Operations chapter of this product guide.

8 - To copy transactions from the selected [sub-job/task](#) to a new [sub-job/task](#)

The Copy [Quotation](#) window is displayed.

9 - To enter free-format text against each [quotation](#) detail

You can amend this text subsequently. When you copy [sub-jobs](#) and [tasks](#), this text is not copied. It can be printed on the [Quotation](#) report. It will be transferred to the [job](#) story text if the [quotation](#) is converted to a [job](#).

10 - To override the rolled-up price or margin for the whole [quotation](#). This option is available for the header detail only.

The Price Override window is displayed.

Note: *if the quote has mixed currencies then this option is invalid*

Functions

All Parts View (F16)

Use this to view a list of all parts on the [quotation](#), showing the [sub-job/task](#) for which they are required.

Position List (F17)

Use this to position the cursor at the [job](#) detail that is the closest match for the data entered.

All Labour View (F18)

Use this to view a list of all labour transactions (labour and travel hours) on a [quotation](#) and details of the [sub-job/task](#) for which they are required.

All Expenses View (F19)

Use this to view a list of all expense transactions (expenses and distance driven) on a [quotation](#) and details of the [sub-job/task](#) for which they are required.

Base/Prime (F20)

Use this to toggle between prices in prime/base.

Note: *It is only displayed if the customer's prime currency is not equal to base currency*

Select **Exit (F3)** to leave the [task](#).

Quotation Build Work with Job Parts Demand Window

To display this window, enter 5 against a [quotation](#) line and then press Enter on the [Quotation](#) Build Work with Details window.

Use this window to record parts required on a [quotation](#) line.

Fields

Heading Fields

Destination Message

The message shows the address to which the parts will be shipped. To change the destination address, select **Name/Address Override (F18)**.

The hierarchy of addresses used by the system is:

Tot. Price

This field displays the price of the items visible on the window at the moment using either standard pricing or advanced pricing as determined by the [Sales Order Processing company](#) profile.

However, the [cover type/job category](#) charge matrix will determine if the price of the item returned from the pricing routines is added to the total price. The item may be free of charge under the [terms](#) of the [contract](#) cover.

Order No

This field will never have a value in [Quotation](#) mode.

Table**Part Number**

This field displays a valid Inventory item number.

Description

This field displays the Inventory description.

Required Quantity

This field displays the quantity required. This is either the value entered on this window or the value derived from the [job](#) template, if a template was used to generate this parts requirement.

Available Quantity

This field displays the quantity currently available for this item in the identified stockroom. This is for information only. This does not affect any processing on this window.

S

This field displays the status of this [Sales Order Processing](#) order line within the order fulfilment system. It will never have a value in [Quotation](#) mode.

SK

This field displays the stockroom you have entered or the stockroom derived from the [job](#) template and from which stock is to be allocated. This stockroom can be superseded by the Equipment Servicing Hunt Group processing if this has been set up via the Maintain Hunt Groups system utilities [task](#).

Date Req

This field defaults to the target start date of the [job line](#). The stock must be there to allow the [sub-job](#) or [task](#) to commence. The date can be overridden, but cannot be manually entered as earlier than the current date.

Text

An asterisk (*) in this column indicates that order line text has been attached to this parts line and when the order is created it will be written to the Order Text file.

Kit

An asterisk (*) in this column indicates that the item on this parts line is defined as a kit item in the Inventory Item Master file.

Input Fields**Part Number**

Enter a valid Inventory item number.

Alternatively, use the prompt facility to select from the Item Master Scan pop-up.

Required Quantity

Enter a required quantity for the item. This must be a positive value.

Unit of Measure

Enter a valid unit of measure for the item.

Alternatively, use the prompt facility to select from the Purchase/Issue Unit Selection pop-up.

Stockroom

Enter a valid stockroom for the item.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

This should be the stockroom from which you want the item to be allocated. This field defaults to the stockroom associated with the technician, if one is assigned to the [job line](#), or to the [branch](#) stockroom if no technician is assigned.

Note: If the item is defined as FIFO then any [costs](#) retrieved at [quotation](#) creation time may be misleading particularly if the price is determined by applying a mark up %.

Delivery Date

This field defaults to the target start date of the [job line](#) or the current date if the target date and time is earlier than the current date. You can enter or select any valid date that is greater than or equal to the current date.

Value

Enter the total value of the [quotation](#) line.

If this field is left blank, the value will be calculated from using the normal EQ pricing rules. If this field has a value then this will fix the price of the parts on this [quotation](#) line.

FOC

This denotes that the Parts are Free of Charge (FOC). They will be priced or valued at 0.

Options**Select**

Use this to select this line for amendment. The values will be moved down into the input fields to allow amendment.

Text

Use this to enter text for the [job line](#). This will be written as order line text when the [Sales Order Processing](#) order is placed.

Delete

Use this to delete the parts requirement line.

Item Enquiry

Use this to display the All Stockrooms for an Item Enquiry window.

Item/Stockroom Enquiry

Use this to display the Inventory Item/Stockroom Enquiry window, using the stockroom on the line.

Stock Search

Use this to search through the hunt group associated with the stockroom currently on the parts line. Use this only if the available stock in the starting stockroom is 0. If no hunt group is set up, no search will be performed. The search will stop at the first stockroom in the hunt group that has available stock of this item and will return this stockroom and the available quantity to the parts line.

***Note:** This is only a suggestion as to the stockroom from which stock will be allocated. No allocation takes place. Therefore between the time at which this available stock value is displayed and the time at which the order is placed, the stock situation may have changed.*

PO Enquiry

Use this to view the outstanding purchase orders for the item on the parts line. This will [call](#) the standard Orders by Item enquiry.

Workshop Search

Use this to see if there are any outstanding Service Exchange [jobs](#) for the item on the parts line. Service Exchange [jobs](#) are raised to refurbish incoming items and return them to stock. Therefore, if the item is due in for refurbishment, there may be no need to raise a purchase order if there is no current stock.

***Note:** This is only a view of outstanding Service Exchange [jobs](#). There is no way to allocate the incoming items to this parts line.*

Functions**Stock Search (F6)**

Use this to search through all the parts line on the window and perform the hunt group processing associated with the stockroom currently on each parts line. Use this only if the available stock in the starting stockroom is 0. If no hunt group is set up, no search will be performed. The search will stop at the first stockroom in the hunt group that has available stock of this item and will return this stockroom and the available quantity to the parts line.

More Details (F13)

Use this to toggle the display to show more or less details.

Order Header Text (F14)

Use this to set up order header text that will be attached to the [Sales Order Processing](#) order when it is created.

Authorised Parts (F15)

Use this to list all parts that can be ordered for the [model](#) number on the [job line](#).

Note: *If one item is set up in the authorised [parts list](#), only this part can be ordered. If no parts are set up on the list, all items can be ordered.*

All Parts View (F16)

Use this view all parts currently booked to ALL lines in the [job](#) structure. This will allow you to determine quickly if a part is already being used on another part of the [job](#).

Name/Address Override (F18)

Use this to set up an override name and address for the order. Parts will be delivered to this address. It will be written as the override name and address on the [Sales Order Processing](#) order.

Select **Previous (F12)** to return to the [Quotation](#) Build Work with Transactions Window.

Quotation Build Work with Expenses Window

To display this window, enter 6 against a [quotation](#) line and then press Enter on the [Quotation](#) Build Work with Details window.

Use this window to enter the details for the [expense types](#). You use these to build [costs](#) for the [quotation](#). You can assign expenses to all, some or none of the [quotation](#) details. You can add your quoted [costs](#), at the lowest level. This leaves the header level for aggregating the [costs](#) and prices.

This window lists a summary by expense code of all transactions entered. If the [expense type](#) is the Inventory [expense type](#), defined on the [company](#) profile, these [costs](#) are calculated from a [parts list](#).

The three [expense types](#) that are listed on this window default from the Equipment Servicing [company](#) profile. They are the default [expense types](#) for:

Other [expense types](#) cannot be used.

Options**Delete**

Use this to delete a line and all references of that expense within a [job](#) detail

You only delete the references for the chosen expense of the [job](#) detail.

Global Mark Up

Use this to uplift all transactions for a particular [expense type](#).

Enter the percentage uplift in the displayed window.

Transactions

Use this to enter/view a number of transactions for an [expense type](#).

The [Quotation](#) Build Work with Transactions window is displayed.

Functions

Position List (F17)

Use this to position the cursor at the [expense type](#) that is the closest match for the data entered.

Select Transactions against an [expense type](#) to display the [Quotation](#) Build Work with Transactions window.

Quotation Build Work with Transactions Window

To display this window, select Transactions against an [expense type](#) on the [Quotation](#) Build Work with Expenses window.

Use this window to maintain the transactions for an [expense type](#). The details displayed depend upon the [expense type](#) selected. You can enter a number of transactions against each [expense type](#). Each transaction has a reference number.

Options

Change

Use this to amend the transaction. The transaction window displayed (labour, direct or travel time) depends on the [expense type](#) of the [job](#) detail.

Delete

Use this to delete the transaction.

Functions

Add (F6)

Use this to add a transaction. The transaction pop-up displayed (labour, direct or travel time) depends on the [expense type](#) of the [job](#) detail.

Position List (F17)

Use this to position the cursor at the transaction that is the closest match for the data entered.

Either select Change against a transaction or select **Add (F6)** to display the relevant Add/Amend Transactions pop-up.

Add/Amend Labour Transactions Pop-up

To display this pop-up, select Change against a transaction or select **Add (F6)** on the [Quotation](#) Build Work with Transactions window for a labour [expense type](#).

Use this pop-up to enter the details for labour transactions. This pop-up displays a system-generated reference number for the transaction.

Fields

Grade

Enter an existing grade.

Alternatively, use the prompt facility to select from the Technician [Job](#) Grade pop-up.

Hours

Enter the number of hours quoted for the grade.

Narrative

Enter free-format text to describe the transaction.

Uplift Code

Enter the [uplift code](#) that will apply to the labour [cost](#)/price.

Alternatively, use the prompt facility to select from the Select [Timesheet Uplift Code](#) pop-up.

Fixed Price

Enter one of the following:

0 - If you do want any global mark ups to apply to this [cost](#)

1 - To protect the transaction from any global mark-up

Press Enter to save the details. The window is re-displayed with the next reference number. Either enter another transaction or select **Previous (F12)** to re-display the [Quotation](#) Build Work with Transactions window.

Add/Amend Direct Transactions Pop-up

To display this pop-up, select **Add (F6)** on the [Quotation](#) Build Work with Transactions window for an expenses [expense type](#).

Use this pop-up to enter the details for direct transactions. This pop-up displays a system-generated reference number for the transaction.

Fields

Charge Code

Enter a valid [charge code](#) for the transaction.

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

External Ref

Enter a unique free-format reference.

Narrative

Enter a description using free-format text.

Quantity

Enter the quantity.

Unit Cost

Enter a unit [cost](#).

Total Cost

Enter the total [cost](#). Leave this field blank if you want the software to calculate this as the quantity x unit [cost](#).

Unit Price

Enter a unit price.

Total Price

Enter the total price. Leave this field blank if you want the software to calculate this as the quantity x unit price.

Mark Up

Enter the percentage mark-up to apply to the [cost](#). This overrides any price entered.

Fixed Price

Enter one of the following:

0 - If you do want any global mark ups to apply to this [cost](#)

1 - To protect the transaction from any global mark-up

Klms/Miles

The heading displayed is soft-coded and is set up using the **Maintain Codes/Parameters [task \[3/EQU\]](#)** under type DIST. You can decide whether miles or kilometres are more appropriate for your [company](#).

Enter the number of miles or kilometres driven. If you use this field, the only additional entries allowed are the [charge code](#), reference and narrative.

If you are amending a transaction which has miles or kilometres entered, the only fields displayed on the window are Klms/Miles, [Charge Code](#), Reference and Narrative. All other fields are hidden.

Press Enter to save the details. The window is re-displayed with the next reference number. Either enter another transaction or select **Previous (F12)** to re-display the [Quotation](#) Build Work with Transactions window.

Add/Amend Travel Hours Transactions Pop-up

To display this pop-up, select **Add (F6)** on the [Quotation](#) Build Work with Transactions window for a travel [expense type](#).

Use this pop-up to enter the details for travel transactions. This pop-up displays a system-generated reference number for the transaction.

Fields

Grade

Enter the grade of the technician that will be travelling.

Alternatively, use the prompt facility to select from the Technician [Job](#) Grade pop-up.

Travel Hours

Enter the number of travel hours.

Narrative

Enter a description, using free-format text.

Press Enter to save the details. The window is re-displayed with the next reference number. Either enter another transaction or select **Previous (F12)** to re-display the [Quotation](#) Build Work with Transactions window.

Price Override Pop-up

To display this pop-up, enter 10 against a [quotation](#) line and then press Enter on the [Quotation](#) Build Work with Details window.

Use this pop-up to enter the override details for the selected [job](#). This pop-up displays the total [cost](#) as a rolled-up value. The price or margin is highlighted to show that an override exists at this level.

Fields

Margin/Price Override

Enter one of the following:

M - To enter a percentage margin

P - To enter a selling price

Note: *If you override the existing value/margin, the prices throughout the structure are all amended to correspond with the change in the original price. To undo the override, re-display this window and then select Delete Override (F11).*

Margin

Enter the percentage margin required. You must set the Margin/Price Override field to **M**.

Selling Price

Enter the required selling price. You must set the Margin/Price Override field to **P**.

Functions

Delete Override (F11)

This [calls Job](#) Pricing for the whole [quotation](#) and all prices revert to the pre-override level.

Select **Update (F8)** to update the data and return to the [Quotation](#) Build Work with Details window.

All Parts View Pop-up

To display this pop-up, select **All Parts View (F16)** on the [Quotation](#) Build Work with Details window.

Use this pop-up to show all the parts on a [job](#) and the associated [sub-job](#) and [task](#).

Functions

Part Number View/Sub-job/Task View (F14)

Use this to toggle the display between the two views.

Select **Previous (F12)** to return to the [Quotation](#) Build Work with Details window.

All Labour View Pop-up

To display this pop-up, select **All Labour View (F18)** on the [Quotation](#) Build Work with Details window.

Use this pop-up to show all the labour on the [job](#) including both working (labour) and travel time. They are listed along with the associated [sub-job](#) and [task](#).

Select **Previous (F12)** to return to [Quotation](#) Build Work with Details window.

All Expenses View Pop-up

To display this pop-up, select **All Expenses View (F16)** on the [Quotation](#) Build Detail window.

Use this pop-up to show all the expenses on the [job](#) including both distance (miles or kilometres) and additional [costs](#)/charges. They are listed along with the associated [sub-job](#) and [task](#).

Select **Previous (F12)** to return to the [Quotation](#) Build Work with Details window.

Close Quote [2/EQG]

Use this [task](#) to close a [quotation](#).

When you close a quote, the software automatically closes all [sub-jobs](#) and [tasks](#) for the header.

Note: Before you can use this [task](#), you must set up the reason codes, using the [Close Reason Codes task](#).

Quotation Close Selection Window

To display this window, select the Close Quote [task](#).

Use this window select the [quotation](#) you want to close.

The current [branch](#) name is displayed at the top of the window and if the new Restricted Quote [Branch](#) Access flag is set to **1** on the **Equipment Servicing Codes Maintenance option [2/EQU]** codes / then a Function key, to allow the user to change [Branch](#), is enabled.

Fields

Quote

Enter the [quotation](#) you want to close.

Alternatively, use the prompt facility to select from the Select Quote Header pop-up.

Revision

Enter the revision level you want to close.

Alternatively, use the prompt facility to select from the Select Revision Level pop-up if more than one exists.

Functions

Change Branch (F9)

Use this to [call](#) the [branch](#) selection panel to display a list of [branches](#) that you are authorised to.

Press Enter to display the [Quotation](#) Close window.

Quotation Close Window

To display this window, press Enter on the [Quotation](#) Close Selection window.

Use this window enter the reason why you want to close a [quotation](#).

Fields

Reason Code

Enter the reason why you want to close the [quotation](#).

Alternatively, use the prompt facility to select from the Select [Quotation](#) Close Reason Code pop-up.

Generate Job

Use this checkbox as follows:

Unchecked - Not to create a [job](#) from this [quotation](#)

Checked - To create a [job](#) from this [quotation](#)

Functions**Quotation Enquiry (F20)**

Use this to display the [Quotation](#) Enquiry Details window.

Press Enter to close the quote. If you checked the Generate [Job](#) field, the Generate [Job](#) pop up is displayed.

Generate Job Pop-up

To display this pop-up, check the Generate [Job](#) field and then press Enter on the [Quotation](#) Close window.

Functions**Options (F14)**

Use this to display the Generate [Job](#) Options pop up.

Select **Generate (F8)** to create the [job](#) with all the options defaulted.

Generate Job Options Pop-up

To display this pop-up, select **Options (F14)** on the Generate [Job](#) pop up.

Fields**Job**

This field displays the [quotation](#) number.

Budget Level

Use this to specify the level at which the [costs](#) entered for the [quotation](#) are converted to [budgets](#) for the [job](#).

Select one of the following:

No [budgets](#) - Not to create [budget](#) details

[Job](#) level - To create a [budget](#) record only at [job](#) level

Sub [job](#) level - To create [budget](#) records for the [job](#) and any [sub-jobs](#)

[Task](#) level - To create [budget](#) records for [jobs](#), [sub-jobs](#) and [tasks](#)

Expense level (default) - To create [budget](#) records for [jobs](#), [sub-jobs](#), [tasks](#) and expenses

Default Transfer Method

Enter the default [transfer method](#) (0 to 8) for the [job](#) detail.

This defaults to the [transfer method](#) for the [job category](#) of the prime [job](#).

Cost to Complete Code

If you use [cost](#) to complete, enter the code. You set up the codes as parameters using the Maintain [Cost](#) to Complete [task](#).

If you leave this field blank, the [cost](#) to complete processing does not include this [job](#).

If you want to include the [job](#) in [cost](#) to complete calculations, you must also set up the three [Cost](#) to Complete Methodology fields. If you do not [budget](#) at [expense type](#) level, you cannot use the [cost](#) to complete function at [expense type](#) level.

Maintain Labour Budget from Estimated Hours

Use this checkbox as follows:

Unchecked - To maintain the labour [budget](#) for this [job](#) manually

Checked - To maintain the labour [budget](#) for this [job](#) automatically, using a calculated value of estimated hours

Labour Cost to Complete Methodology

Only use this field if you entered a value in the Include in [Cost](#) to Complete field.

Enter the default method used to calculate the [cost](#) to complete.

- 1 - Finish [budget](#) on time
- 2 - Continue at same level of efficiency
- 3 - Complete at standard rate
- 4 - Input degree of inefficiency to apply to rest of [job](#)
- 5 - Input degree of efficiency to apply to rest of [job](#)
- 6 - Enter hours to complete manually

You can use the prompt facility on this field to select from the Select Labour Methodology pop-up.

Note: For more details on the [cost](#) to complete methodology methods, refer to the Maintain [Cost](#) to Complete section in the [Cost](#) Processing chapter of this product guide.

Materials Cost to Complete Methodology

Only use this field if you entered a value in the Include in [Cost](#) to Complete field.

Enter the default method used to calculate the [cost](#) to complete:

- 1 - Based on commitments
- 2 - Based on original estimates
- 3 - Enter revised estimate

You can use the prompt facility on this field to select from the Select Material Methodology pop-up.

Other Direct Cost to Complete Methodology

Only use this field if you entered a value in the Include in [Cost](#) to Complete field.

Enter the default method used to calculate the [cost](#) to complete:

- 1 - Based on commitments
- 2 - Based on original estimates
- 3 - Enter revised estimate

You can use the prompt facility on this field to select from the Select Other Direct Methodology pop-up.

Select **Generate (F8)** to generate the [job](#).

The software generates the [job](#) in the following ways:

- It copies the [job](#) header and then the [job](#) details back to the [job](#) files.
- It creates [budget](#) records at the requested level, using the [budget](#) type specified in the [Job](#) Management [company](#) profile.

If required, it creates a [parts list](#) and releases the related sales order.

When the quote is closed and is transferred to become a [job](#), any quote text is copied to become [Job Line](#) (JL) text.

Amend Closed Quote [3/EQG]

Currently if a [job](#) has a [quotation](#) attached, it is not possible to modify the charges through Pending Invoice Maintenance or [Job](#) Completion.

If an additional chargeable [task](#) is performed on the [job](#) whilst it is being processed, that additional charge needs to be added onto the [job](#).

This [task](#) allows you to add one or more additional charges onto the [job](#) so that this is what the customer will be charged when the invoice is produced.

Amend Closed Quotation Selection Window

To display this window, select the Amend Closed Quote [task](#).

Use this window to select the [job](#) level to which you want to add the additional charge.

Fields

Job/Sub-job/Task

Enter the [job](#), which originated as a [quotation](#), to which a chargeable transaction is to be added.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Note: The [job](#) entered must be an active [job](#) that was created as a result of a [quotation](#).

Press Enter to view the Closed [Quotation](#) Amend Work with Transactions window.

Closed Quotation Amend Work with Transactions Window

To display this window, enter or select a [job/sub-job/task](#) combination and then press Enter on the Amend Closed [Quotation](#) Selection window.

Use this window to view, amend and add additional chargeable transactions.

Options

Change

Use this to display the Add/Amend Pricing Transaction window, which allows you to change the details.

Delete

Use this to remove the additional charge from the [job](#).

Note: The charge is removed immediately without a confirmation window.

Functions

Add (F6)

Use this to display the Add/Amend Pricing Transaction window, which allows you to add additional charges to the [job](#).

Press Enter to view the Closed [Quotation](#) Work with Transactions window.

Add/Amend Pricing Transactions

To display this window, select **Add (F6)** or select Change against a line on the Closed [Quotation](#) Amendment Work with Transactions window.

Use this window to add or amend additional transactions that will appear on the invoice for the [job](#).

Note: The additional charges entered have [expense type](#) of ZQ.

Fields

External Ref

Enter a unique free-format reference.

Narrative

Enter a description using free-format text.

Quantity

Enter a notional quantity.

Unit Cost

Enter a unit [cost](#).

Total Cost

Enter the total [cost](#). Leave this field blank if you want the software to default this to be the unit [cost](#).

Total Price

Enter the total price. Leave this field blank if you want the software to calculate this as the unit [cost](#) + mark up %.

Mark Up

Enter the percentage mark up to apply to the [cost](#). This overrides any price entered.

Press Enter to add the transaction and return to the Closed [Quotation](#) Amendment Work with Transactions window.

Close Reason Codes [11/EQG]

Use this [task](#) to set up the close reason codes.

When you close a [quotation](#), you must enter a reason for closure. For example, you can set up codes for lost on price, won on completion date, etc.

Note: You cannot set up a blank code and you must enter a reason when you close a [quotation](#).

Quotation Close Reason Codes Selection Window

To display this window, select the Close Reason Codes [task](#).

Use this window to enter or select a reason code to add or maintain.

Fields

Reason Code

Enter a unique two-character reason code.

Alternatively, use the prompt facility to select from the Select [Quotation](#) Close Reason Code pop-up.

Press Enter to display the [Quotation](#) Close Reason Codes window.

Quotation Close Reason Codes Window

To display this window, press Enter on the [Quotation](#) Close Reason Codes Selection window.

Use this window to enter or amend the reason description.

Fields

Description

Enter or amend the description for the reason.

Press Enter to save the details and then select **Exit (F3)** to leave the [task](#).

Chapter 14 Reports

Report on Quote [21/EQG]

Use this [task](#) to print the [quotation](#) details.

You can print the details for a range or quotes, revisions, [sub-jobs](#) and [tasks](#). You can also specify whether the [costs](#), prices, mark ups, all levels, text and transactions are printed.

Quotation Report Selection Pop-up

To display this pop-up, select the Report on Quote [task](#).

Use this pop-up to select the range of [quotations](#) and the details you want to print.

The current [branch](#) name is displayed at the top of the window and if the new Restricted Quote [Branch](#) Access flag is set to **1** on the **Equipment Servicing Codes Maintenance option [2/EQU]** codes / then a Function key, to allow the user to change [Branch](#), is enabled.

Fields

Quote From/To

Enter the range of [quotations](#).

You can use the prompt facility on these fields to select from the Select Quote Header pop-up.

Revision From/To

Enter the range of revisions.

You can use the prompt facility on these fields to select from the Select Revision Level pop-up.

Sub-job From/To

Enter the range of [sub-jobs](#).

Task From/To

Enter the range of [tasks](#).

Print

Print Costs

Use this checkbox as follows:

Unchecked - Not to print [costs](#)

Checked - To print [costs](#)

Prices

Use this checkbox as follows:

Unchecked - Not to print prices

Checked- To print prices

Mark Ups

Use this checkbox as follows:

Unchecked - Not to print mark-ups

Checked - To print mark-ups

All Levels

Use this checkbox as follows:

Unchecked - To print the top level only

Checked - To print all levels

Text

Use this checkbox as follows:

Unchecked - Not to print text

Checked - To print text

Transactions

Select one of the following:

No (0) - Not to print transactions

Summary (1) - To print a summary of the transactions

Transactions (2) - To print all transaction details

Functions

Change Branch (F9)

Use this to [call](#) the [branch](#) selection panel to display a list of [branches](#) that you are authorised to.

When your selection is complete, select **Submit (F8)** to submit a [job](#) to produce the report.

Print Quote [22/EQG]

Use this [task](#) to print the [quotation](#) details for sending to customers.

You can print the details for a single [quotation](#) only.

Quotation Print Pop-up

To display this pop-up, select the Print Quote [task](#).

Use this pop-up to select the [quotation](#) you want to print.

The current [branch](#) name is displayed at the top of the window and if the new Restricted Quote [Branch](#) Access flag is set to **1** on the **Equipment Servicing Codes Maintenance option [2/EQU]** codes / then a Function key, to allow the user to change [Branch](#), is enabled.

Fields

Quote

Enter the quote number.

Alternatively, use the prompt facility to select from the Select Quote Header pop-up.

Revision

Enter the revision number.

Alternatively, use the prompt facility to select from the Select Revision Level pop-up.

Functions

Change Branch (F9)

Use this to [call](#) the [branch](#) selection panel to display a list of [branches](#) that you are authorised to.

When your selection is complete, select **Submit (F8)** to submit a [job](#) to produce the print.

Report on Job Analysis [1/EQA]

This report displays details in actual revenue to date and any commitments outstanding, such as Purchase Management.

The report is structured by project [manager](#), customer, and then [job](#) number.

For each [job](#), the report compiles:

Job Analysis Report Selection Window

To display this window, select the Report on [Job](#) Analysis [task](#).

Use this window to select the information you want to include in the report.

Fields**Project Manager From/To**

Enter the range of [managers](#) on which you want to report.

You can use the prompt facility on these fields to select from the Project [Manager](#) pop-up.

Leave these fields blank to select all [managers](#).

Customer Code From/To

Enter the range of customers on which you want to report.

You can use the prompt facility on these fields to select from the Customer Scan pop-up.

Leave these fields blank to select all customers.

Job Number From/To

Enter the range of [jobs](#) on which you want to report.

You can use the prompt facility on these fields to select from the Select [Job](#) Header pop-up.

Leave these fields blank to select all [jobs](#).

Job Status

Use this field to specify the [job](#) status on which you want to report:

Select one of the following:

Open (1) - Open [jobs](#)

Closed (2) - Closed [jobs](#)

Both (3) - All [jobs](#)

Select **Submit Report (F8)** to submit the report.

Report on Sub-job Analysis [2/EQA]

This report displays details in actual revenue to date, and any commitments outstanding.

Note: This report is similar to the [Job](#) Analysis report, but also breaks the report by [sub-jobs](#).

Sub-job Analysis Report Selection Window

To display this window, select the Report on [Sub-job](#) Analysis [task](#).

Use this window to select the information you want to include in the report.

Fields

Job Number From/To

Enter the range of [jobs](#) on which you want to report.

You can use the prompt facility on these fields to select from the Select [Job](#) Header pop-up.

Leave these fields blank to select all [jobs](#).

Sub-Job From/To

Enter the range of [sub-jobs](#) on which you want to report.

Leave these fields blank to select all [sub-jobs](#).

Sub-Job Status

Use this to specify the [sub-job](#) status on which you want to report.

Select one of the following:

Open (1) - Open [sub-jobs](#)

Closed (2) - Closed [sub-jobs](#)

Both (3) - All [sub-jobs](#)

Select **Submit Report (F8)** to submit the report.

Report on Transactions by Task [3/EQA]

The Transaction by [Task](#) report displays all transactions entered to date.

The transaction details displayed for each selected [job](#) or [sub-job](#) are as follows:

Transactions by Task Report Selection Window

To display this window, select the Report on Transactions by [Task task](#).

Use this window to select the information you want to include in the report.

Fields**Job Number From/To**

Enter the range of [jobs](#) on which you want to report.

You can use the prompt facility on these fields to select from the Select [Job](#) Header pop-up.

Leave these fields blank to select all [jobs](#).

Sub-Job From/To

Enter the range of [sub-jobs](#) on which you want to report.

Leave these fields blank to select all [sub-jobs](#).

Task From/To

Enter the range of [tasks](#) on which you want to report.

Leave these fields blank to select all [tasks](#).

Job Status

Use this to specify the status on which you want to report.

Select one of the following:

Open (1) - Open [jobs](#)

Closed (2) - Closed [jobs](#)

Both (3) - All [jobs](#)

Select **Submit Report (F8)** to produce the report.

Report on Time Utilisation [4/EQA]

The Time Utilisation report displays summarised [timesheet](#) transactions entered to date.

The report prints summaries of the hours for each [timesheet](#) hours type for the selected time period.

The summary report shows the hours for the specific technicians while the summary report gives totals by team.

Time Utilisation Report Selection Window

To display this window, select the Report on Time Utilisation [task](#).

Use this window to select the information you want to include in the report.

Fields

Branch

Enter the [branch](#) on which you want to report.

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Team/To

Enter the range of teams on which you want to report.

You can use the prompt facility on these fields to select from the Team Description pop-up.

If both fields are left blank, all teams will be selected.

Technician/To

Enter the range of technicians on which you want to report.

You can use the prompt facility on these fields to select from the Technician Selection pop-up.

If both fields are left blank, all technicians will be selected.

Date (DDMMYY)/To

Enter or select the range of dates on which you want to report. If the From field is left blank, all records up to the To date will be selected. If the To date is left blank, all records from the From date up until the current date will be selected.

Period (YYMM)

Enter the period on which you want to report. This will only select transaction lines with a [timesheet](#) period the same as this period.

Note: *The Date and Period fields are mutually exclusive.*

Summary/Detail

Select one of the following:

Summary (default) - To prints totals by team

Detail - To print totals by technician

Select **Submit Report (F8)** to submit the report.

Report on Timesheet Details [5/EQA]

The [Timesheet](#) Detail report displays details of selected [timesheet](#) transactions entered to date.

The detail report prints the individual transactions by technician showing by technician:

The summary report shows the total hours by [timesheet](#) hours type for the teams.

Timesheet Detail Report Selection Window

To display this window, select the Report on [Timesheet](#) Details [task](#).

Use this window to select the information you want to include in the report.

Fields**Branch**

Enter the [branch](#) on which you want to report.

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Team/To

Enter the range of teams on which you want to report.

You can use the prompt facility on these fields to select from the Team Description pop-up.

If both fields are left blank, all teams will be selected.

Technician/To

Enter the range of technicians on which you want to report.

You can use the prompt facility on these fields to select from the Technician Selection pop-up.

If both fields are left blank, all technicians will be selected.

Date (DDMMYY)/To

Enter or select the range of dates on which you want to report. If the From field is left blank, all records up to the To date will be selected. If the To date is left blank, all records from the From date up until the current date will be selected.

Period (YYMM)

Enter the period on which you want to report. This will only select transaction lines with a [timesheet](#) period the same as this period.

Note: *The Date and Period fields are mutually exclusive.*

Summary/Detail

Select one of the following:

Summary (default) - To print totals by team

Detail - To print totals by technician

Select **Submit Report (F8)** to submit the report.

Report on Job Transactions [6/EQA]

The [Job](#) Transactions report displays details of selected transactions or commitments entered to date.

Both the detail and the summary report print the selection parameters on the first page.

The detail report prints the individual transactions by [job](#) showing:

If commitments are selected they show:

The final page of the detail report prints summaries by:

Each of the final summaries shows:

The summary version of the report prints the selected totals showing:

The final page of the summary report prints summaries by:

Each of the final summaries shows:

Travel hours are displayed as a separate total within:

Note: Care should be taken when selecting data for the report, as it is very easy to print a very big report.

Job Transactions Report Selection Window

To display this window, select the Report on [Job Transactions task](#).

Use this window to select the information you want to include in the report.

Fields

Branch/To

Enter the range of [branches](#) on which you want to report.

You can use the prompt facility on these fields to select from the [Branch Selection](#) pop-up.

If both fields are left blank, all [branches](#) are selected.

The default is the user's [branch](#) in both the From and To fields.

Job Discipline/To

Enter the range of [job](#) disciplines on which you want to report.

You can use the prompt facility on these fields to select from the [Job Discipline](#) pop-up.

If both fields are left blank, all disciplines will be selected.

Job Category/To

Enter the range of [job](#) categories on which you want to report.

You can use the prompt facility on these fields to select from the [Job Category Selection](#) pop-up.

If both fields are left blank, all categories will be selected.

Period (YYMM)/To

Enter the range of periods on which you want to report. This will only select transaction lines with a [timesheet](#) period within the range.

Job Number

Enter the [job](#) number on which you want to report.

Alternatively, use the prompt facility to select from the Select [Job Header](#) pop-up.

If this field is left blank, all [jobs](#) will be selected.

Customer Number/Address Sequence (Untitled)

Enter the customer number and address sequence on which you want to report.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If these fields are left blank, all customers will be selected.

Note: *You can enter a customer number with or without an address sequence.*

Job Status

Select one of the following:

- Open - To select prime [jobs](#) with a status below 90
- Closed - To select prime [jobs](#) with a status of 90 or above
- Both - To select [jobs](#) which satisfy all other criteria, regardless of status

Summary/Detail

Select one of the following:

- Summary (default) - To print totals by team
- Detail - To print totals by technician

Actuals/Commitments

Select one of the following:

- Actuals only (default) - If the transactions printed/summarised are real transactions that have been booked against the [job](#)
- Commitments only - If the transactions printed/summarised are committed but have not yet been booked against the [job](#)
- Both - To include both actual and [committed costs](#)

Select **Submit Report (F8)** to submit the report.

Report on Repair History [7/EQA]

The Repair History report shows transactions entered to date and totals hours, [costs](#) and revenue.

The report prints the selection parameters on the first page.

It then prints the individual transactions by [job](#), showing:

Total [cost](#), hours and revenue are printed by [model](#), customer and report.

Repair History Report Selection Window

To display this window, select the Report on Repair History [task](#).

Use this window to select the information you want to include in the report.

Fields

Account Number/Address Sequence (Untitled)

Enter the customer number and address sequence on which you want to report.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If these fields are left blank, all customers will be selected.

Note: You can enter a customer number with or without an address sequence.

Note: If the account is not entered, the [serial numbers](#) become mandatory.

Model

Enter a valid [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

If this field is left blank, all [models](#) will be selected.

If a [model](#) is entered as well as an account number, a check is made that the account number has at least one of that [model](#) in its installed base.

Job Category

Enter the [job category](#) on which you want to report.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

If this field is left blank, all [job](#) categories will be selected.

Serial Number/To

Entry in at least one of these fields is mandatory if no account number is entered.

If only the From [serial number](#) is entered, the From becomes the To [serial number](#).

Job Start/To

If a From date is entered, only [jobs](#) where the date of contact is equal to the From start date are selected.

If a To date is entered, only records equal to the To date are selected.

If a date range is entered, all [jobs](#) with a start date within the date range (inclusive) are selected.

Job Close/To

If a From date is entered, only [job](#) records with a date of completion equal to the From date are selected.

If a To date is entered, only records equal to the To date are selected.

If a date range is entered, all [jobs](#) with a close date within the date range (inclusive) are selected.

Note: [Job](#) start and [job](#) close dates are mutually exclusive.

Select **Submit Report (F8)** to produce the report.

Report on Job Status [8/EQA]

The [Job](#) Status report displays details of selected transactions or commitments entered to date.

Both the detail and the summary report print the selection parameters on the first page.

The summary report prints a line for each [job line](#) showing:

If the report is run in detail mode, for each record printed above, a second line should be printed showing:

Both reports will produce totals of commitments, actual [cost](#), revenue and [budget](#) by [job category](#), [job](#) discipline, [branch](#) and report.

Job Status Report Selection Window

To display this window, select the Report on [Job](#) Status [task](#).

Use this window to select the information you want to include in the report.

Fields

Branch/To

Enter the range of [branches](#) on which you want to report.

You can use the prompt facility on these fields to select from the [Branch](#) Selection pop-up.

If both fields are left blank, all [branches](#) are selected.

Job Discipline/To

Enter the range of [job](#) disciplines on which you want to report.

You can use the prompt facility on these fields to select from the [Job](#) Discipline pop-up.

If both fields are left blank, all disciplines will be selected.

Job Category/To

Enter the range of [job](#) categories on which you want to report.

You can use the prompt facility on these fields to select from the [Job Category](#) Selection pop-up.

If both fields are left blank, all categories will be selected.

Period (YYMM)/To

Enter the range of periods on which you want to report. If both fields are left blank, all periods will be selected.

Job Start (DDMMYY)/To

If a From date is entered, only [jobs](#) where the date of contact is equal to the From date are selected.

If a To date is entered, only records equal to the To date are selected.

If a date range is entered, all [jobs](#) with a start date within the range (inclusive) are selected.

Job Target/To

If a From date is entered, only [jobs](#) where the target date is equal to the From date are selected.

If a To date is entered, only records equal to the To date are selected.

If a date range is entered, all [jobs](#) with a target date within the range (inclusive) are selected.

Job Closed/To

If a From date is entered, only [jobs](#) where the date of completion is equal to the From date are selected.

If a To date is entered, only records equal to the To date are selected.

If a date range is entered, all [jobs](#) with a completion date within the range (inclusive) are selected.

Technician/To

Enter the range of technicians on which you want to report.

You can use the prompt facility on these fields to select from the Technician Selection pop-up.

If both fields are left blank, all technicians will be selected.

Job Number

Enter the [job](#) number on which you want to report.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

If this field is left blank, all [jobs](#) will be selected.

Account Number/Address Sequence (Untitled)

Enter the customer number and address sequence on which you want to report.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If these fields are left blank, all customers will be selected.

Note: *An account number can be entered with or without an address sequence.*

Job Status

Select one of the following:

Open - If prime [jobs](#) with a status below 90 will be selected

Closed - If prime [jobs](#) with a status of 90 or above will be selected

Both - If [jobs](#) which satisfy all other criteria will be selected (above and below status 90).

Summary/Detail

Select one of the following:

Summary (default) - To print totals by team

Detail - To prints totals by technician

Select **Submit Report (F8)** to produce the report.

Report on Installation [9/EQA]

The [Installation](#) report prints details of machine [installations](#) at specific customer [sites](#).

The report prints the selection parameters on the first page.

The report prints a line for each [installation](#) showing:

The report totals the number of machines for the selection parameters.

Installation Report Selection Window

To display this window, select the Report on [Installation task](#).

Use this window to select the information you want to include in the report.

Fields

Division/To

Enter the range of [divisions](#) on which you want to report.

You can use the prompt facility on these fields to select from the [Division](#) Selection pop-up.

If these fields are left blank, all [divisions](#) are selected.

Model Group/To

Enter the range of [model](#) groups on which you want to report.

You can use the prompt facility on these fields to select from the [Model](#) Group Selection pop-up.

If these fields are left blank, all [model](#) groups are selected.

Note: *If a range of [model](#) groups is entered, the [division](#) must also be entered.*

Model Sub-Group/To

Enter the range of [model](#) sub-groups on which you want to report.

You can use the prompt facility on these fields to select from the [Model](#) Subgroup Selection pop-up.

If these fields are left blank, all sub-groups are selected.

Note: *If a range of [model](#) sub-groups is entered, a [model](#) group must also be entered.*

Model/To

Enter the range of [models](#) on which you want to report.

You can use the prompt facility on these fields to select from the [Model](#) Master Scan pop-up.

If these fields are left blank, all [models](#) are selected.

Note: If a range of [models](#) is entered, the [Division](#), [Model](#) Group and [Model](#) Sub-group fields should be left blank.

Customer Number/To

Enter the range of customers on which you want to report.

You can use the prompt facility on these fields to select from the Customer Scan pop-up.

If these fields are left blank, all customers are selected.

Location/To

Enter the range of customer [sites](#) on which you want to report.

Branch/To

Enter the range of [branches](#) on which you want to report.

You can use the prompt facility on these fields to select from the [Branch](#) Selection pop-up.

If these fields are left blank, all [branches](#) are selected.

Equipment Status/To

Enter the range of [status codes](#) on which you want to report.

You can use the prompt facility on these fields to select from the Equipment Status pop-up.

If these fields are left blank, all [status codes](#) are selected.

Note: This is validated against the Equipment Servicing Codes/Parameters file, type STAT.

Equipment Type/To

Enter the range of equipment types on which you want to report.

You can use the prompt facility on these fields to select from the [Model](#) Type pop-up.

If these fields are left blank, all types are selected.

Note: This is validated against the Equipment Servicing Codes/Parameters file, type PERI.

Grouping By

Select one of the following group levels to group the selected records:

Select **Submit Report (F8)** to produce the report.

Report on Cycle Time [10/EQA]

The Cycle Time report measures elapsed days between different events in a [job](#). It allows the business to understand the bottlenecks in their processes and to measure their inefficiencies (by measuring elapsed days between key dates in the life of a [job](#)).

The report prints the selection parameters on the first page.

It then prints details of the individual [jobs](#) showing:

In addition, it prints details of the numbers of days that exceed the days selected against the various options in the Minimum Elapsed Days Selection.

Cycle Time Report Selection Window

To display this window, select the Report on Cycle Time [task](#).

Use this window to select the information you want to include in the report.

Fields

Job Category

Enter the [job category](#) on which you want to report.

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

If this field is left blank, all [job](#) categories will be selected.

Customer Number/Location

Enter the customer number and address sequence on which you want to report.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If these fields are left blank, all customers will be selected.

Note: A customer number can be entered with or without an address sequence.

Job Number

Enter the [job](#) number on which you want to report.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

If this field is left blank, all [jobs](#) will be selected.

Status/To

Enter the range of [status codes](#) on which you want to report.

Alternatively, use the prompt facility to select from the [Job Line](#) Status pop-up.

If these fields are left blank, all [status codes](#) will be selected.

Date/To

If a From date is entered, only [jobs](#) where the date of contact is equal or greater than the From date are selected.

If a To date is entered, only [jobs](#) that have ended before this date are selected.

The end date is when the prime [job](#) first goes above status 50.

If these dates are left blank, all [jobs](#) will be listed irrespective of the start and end dates.

Equipment Type/To

Enter the range of equipment types on which you want to report.

Alternatively, use the prompt facility to select from the [Model](#) Type pop-up.

If these fields are left blank, all equipment types will be selected. The equipment type is an attribute of the [model](#) on the prime [job](#).

Minimum Elapsed Days Selection

The following fields are available for selection on the window and are printed if the number of days calculated exceeds the number selected.

Planning

Planned lead time = (first transaction date) MINUS ([call](#) logging creation date)

Throughput

Throughput lead time = (last transaction date) MINUS (first transaction date)

Shipping Lead Time

Shipping lead time = (ship date to customer) MINUS (last transaction date)

The ship date to customer is the date on which the equipment was returned to the customer. It was written to the Status Audit file when the status of this [job](#) was set to 60. If the [job](#) has never been set to status 60, there is no ship date.

Note: Service [jobs](#) will not have a ship date.

Invoice Lead Time

Invoice lead time = (invoice date) MINUS (last transaction date)

The invoice date will be the first invoice date (although there may be many invoices for the [job](#)).

Last Posting Lead Time

This is only calculated if no invoice date is retrieved.

Last posting lead time = (last transaction date) MINUS (current date)

Customer Lead Time

Customer lead time = (ship date to customer) MINUS ([call](#) logging creation date)

The WIP Time

[WIP](#) time = (invoice date) MINUS (first transaction date)

Total Lead Time

Total lead time = (invoice date) MINUS ([call](#) logging creation date)

Select **Submit Report (F8)** to produce the report.

Chapter 15 AFI

Install Link to AFI (Invoicing) [1/EQUA]

If you want to use [AFI](#) to post invoice/credit information from Equipment Servicing to the [General Ledger](#), you must use this [task](#) to set up the Equipment Servicing details in the [AFI](#) files.

Note: *It is recommended that journal conditions be set up first as under test and that they are thoroughly proven before they are set to live and [AFI](#) is activated.*

Until [AFI](#) is activated, posting of invoices and credit notes to the [General Ledger](#) will continue to take place via the standard facilities of the Basic Financial Integrator. When [AFI](#) is set to active, postings to the [General Ledger](#) will take place via [AFI](#) during each subsequent invoice or credit note run.

To activate [AFI](#) you must do the following:

Use the **Maintain Journal Conditions [task](#) [1/FIM]** to change the status of your journal conditions from 0 (Inactive) or 1 (Under Test) to a status of 2 (Live).

Note: *This need not be done for all journal conditions, only those which you are ready to activate.*

The four Equipment Servicing journals that should be set up are:

- **Service [job](#) invoices** with posting rules for J-type invoices to debtors (that is, invoice total of goods plus Tax), standard Tax and sales
- **[Service contract](#) invoices** with posting rules for C-type invoices to debtors (that is, invoice total of goods plus Tax), standard Tax and deferred revenue
- **Sundry invoices/credit notes** with posting rules for S-type invoices and credit notes to debtors (that is, invoice total of goods plus Tax), standard Tax and sales
- **Deferred revenue** to sales with posting rules for C-type and D-type invoices

This automatically runs with [service contract](#) invoices to post any current GL period journals to sales.

Caution: Only one of the four journals should be live at any one time, otherwise duplication of the journals postings will occur.

To use [AFI](#) in a live situation, you need to create these journal conditions and posting definitions, incorporating your own [General Ledger](#) accounts. You may also need to set up additional account rules, data conversion codes and templates.

Equipment Servicing

Use this [task](#) to change the status of the [AFI](#) Link from BFI Mode to [AFI](#).

Note: In BFI mode, [General Ledger](#) postings are limited to the accounts you have entered in the Equipment Servicing [company](#) profile.

[AFI](#) will now be used to process invoices and credit notes to create [General Ledger](#) journals, according to your rules and definitions, from the point when your next invoice or credit run takes place.

If [AFI](#) determines that an extract or update would not be completed successfully, a message is sent, giving details of the problem. After correction, the next invoice run will collect all outstanding data.

The [task](#) copies information across, including the module name, the logical files to be used and the database records to be accessed. The database identifies the files and the specific fields to be made available to [AFI](#).

Select **Confirm Submit (F8)** to submit a [job](#) to install the necessary data in the [AFI](#) files.

Initialise AFI Data

When [AFI](#) is activated, existing records are flagged so as not to be extracted via [AFI](#). The assumption is made that manual journals will have been entered into the [General Ledger](#) if the data was required for GL prior to activating [AFI](#).

AFI Data Dictionary - Invoicing

- Item Master
- Customer Details
- Sales Ledger Customer Master
- EQ Customer Details
- [Model](#) File
- Engineer Master File
- Service Equipment File
- [Job](#) Header
- Invoice Header
- Invoice Lines

The following fields on the Invoice files can be used to post a value to the [General Ledger](#):

- Invoice Lines
- Invoice Header

AFI Invoicing Movement Extract - Test Mode

[2/EQUA]

This [task](#) performs the same functionality as a live extract but no actual updating of data takes place within either Equipment Servicing or the [General Ledger](#). This is simply a simulation of the effect of creating the specified journals in the nominated [company](#) so that any errors in the journal conditions and rules can be rectified. This allows a selection of data to be tested against journal conditions.

The [task](#) allows selection by invoice number or invoice number range. When prompting on invoice number range, the window will display the invoice number and account number with appropriate headings.

Fields

Source Company

Enter the [company](#) to be used to select the invoices.

Alternatively, use the prompt facility to select from the [Company](#) Selection pop-up.

Include Only Invoices Not Already Extracted

This allows you to select documents previously extracted to check them against new definitions. Once the system has a reasonable amount of data set up, this helps you to check that new definitions will not result in erroneous postings.

Use this checkbox as follows:

- Unchecked - To specify a range of transaction numbers on which you want to base the trial
- Checked - To use data that has not been extracted in live operation mode by [AFI](#)

Include Invoices From/To

If you did not **check** the Include Only Invoices Not Already Extracted field, specify the range of transaction dates in the source application you want to use in this trial. If you want to use only a single transaction, specify the same date in the From and To fields.

Transactions within the source application that can be used for this trial are displayed in a pop-up.

Type of Journal Definition to Use

Select one of the following:

- Under Test - If journal definitions are to be used that have not yet been set to be live
- Live - If only live journal definitions are to be used
- Both - If both live and test definitions are to be used

This allows you to check differences and ensure that the postings will be as expected.

Consolidate Postings

Use this checkbox as follows:

- Unchecked - For consolidation not to take place, even though you may have postings defined as consolidatable

- Checked - For consolidation to take place on those postings defined as consolidatable

Press Enter to validate your entries and then select **Proceed (F8)** to submit the [job](#) to perform the trial extract.

AFI Invoicing Extract Processing

The [AFI](#) Invoice Extract program runs as part of this trial extract using selected documents or as part of the invoice posting routines where invoices not yet selected are processed.

Each invoice will be tested against the journal conditions that have been specified in [AFI](#) for the EQ application and create the appropriate records in the [AFI](#) tables.

The files for this application include:

- [Sales Order Processing](#) Customers (OEP20)
- Sales Ledger Customers (SLP05)
- Inventory Parts (INP35)
- EQ Customers (EQP21)
- EQ Invoice Lines (EQP46)
- EQ Invoice Header (EQP45)
- EQ [Job](#) Header (EQP54)
- EQ [Models](#) (EQP30)

Install Link to AFI (Cost Movements) [4/EQUA]

If you want to use [AFI](#) to post [cost](#) information from Equipment Servicing to the [General Ledger](#), you must use this [task](#) to set up the Equipment Servicing details in the [AFI](#) files.

These include the module name, the logical files to be used and the database records to be accessed. The database identifies the files and the specific fields to be made available to [AFI](#). The journal conditions and posting definitions for the transactions should then be set up within [AFI](#).

Note: *It is recommended that journal conditions be first set up as under test and that they are thoroughly proven before they are set to live and [AFI](#) is activated.*

Select **Confirm Submit (F8)** to submit the [job](#).

Initialise AFI Data

When [AFI](#) is activated, existing records are flagged so as not to be extracted via [AFI](#). The assumption is made that manual journals will have been entered into the [General Ledger](#) if the data was required for GL prior to activating [AFI](#).

The application code for EQ [cost](#) movements is EC.

AFI Data Dictionary

The following files, and their associated fields, are available for defining how selection and consolidation or both are to take place.

- Item Master
- Customer Details
- Sales Ledger Customer Master
- EQ Customer Details
- [Job](#) Header
- [Model](#) File
- Engineer Master File
- [Cost](#) Movement File
- Quantity Fields

The following fields are defined as quantities that are available to post.

- [Cost](#) Movements
- Value Fields

The following fields on the [Cost](#) Movement Details file can be used to post a value to the [General Ledger](#):

- [Cost](#) Movements

AFI Cost Movements Extract - Test Mode [5/EQUA]

This program performs the same functionality as a live extract but no actual updating of data takes place within either Equipment Servicing or the [General Ledger](#). This is simply a simulation of the effect of creating the specified journals in the nominated [company](#) so that any errors in the journal conditions and rules can be rectified.

The [AFI](#) Trial Extract prompt program will [call](#) the [AFI](#) Extract Processing Module ([costs](#)) so that selected data can be tested against journal conditions.

The relevant files are copied to a temporary library and the [AFI](#) extract program is run in test mode using these temporary files.

Fields

Source Company

Enter the equipment servicing [company](#) from which [cost](#) movement data is to be extracted.

Alternatively, use the prompt facility to select from the [Company](#) Selection pop-up.

Work with Cost Movements Not Yet Processed

Use this checkbox as follows:

- Unchecked - To specify a range of dates on which you wish to base the trial
- Checked - To extract data that has not been extracted in live operation mode by [AFI](#)

Work with Cost Movements Between

If you did not **check** the Work with [Cost](#) Movements Not Yet Processed field, specify a range of transaction dates between which [cost](#) movements in the source [company](#) are extracted for this trial.

Type of Journal Definition to Use

Select one of the following:

- Under Test - To use journals that are specified as being under test
- Under Live - To use journal definitions that are specified as being live
- Both - To use both test and live journal definitions

Consolidate Postings

Use this checkbox as follows:

- Unchecked - For no consolidation to take place, even though there may be journal postings defined as able to consolidate
- Checked - For consolidation to take place on those journal postings defined as able to consolidate

Select **Proceed (F8)** to submit the [job](#).

AFI Extract Processing Module (Costs)

This will process all the [cost](#) movement records that have been selected by the driver program. These records will be tested against the journal conditions that have been specified in [AFI](#) for the application EC. If a journal condition is met, any posting definitions are examined and any rules applied. The values of the data dictionary fields used in the posting definition will be obtained by accessing the relevant files.

The files for this application include:

- [Sales Order Processing](#) Customers (OEP20)

- Sales Ledger Customers (SLP05)
- Inventory Parts (INP35)
- EQ Customers (EQP21)
- EQ [Cost](#) Movements (EQPEQ)
- EQ [Job](#) Header (EQP54)

If the conditions on the journal are met, an [AFI](#) Transaction record will be written ready to be posted to the [General Ledger](#).

The values that are to be posted to the [General Ledger](#) are held on these transaction records. These values are dependent on the Value to Post field that has been specified on the journal. If a base currency field has been selected, [AFI](#) will also write the corresponding prime currency value to the [AFI](#) transaction record and vice versa. This is to ensure that both base and prime value fields are populated irrespective of which field has been specified.

An [AFI](#) session is created which holds all the transactions that have been generated from the extract.

The GL update field on the [Cost](#) Movement record is updated to indicate the transaction has been processed.

Note: Only [cost](#) movement transactions with a [transaction source](#) IM will access the Inventory Parts file.

Install Link to AFI (Income Movements) [7/EQUA]

If you want to use [AFI](#) to post income information from Equipment Servicing to the [General Ledger](#), you must use this [task](#) to set up the Equipment Servicing details in the [AFI](#) files.

These include the module name, the logical files to be used and the database records to be accessed. The database identifies the files and the specific fields to be made available to [AFI](#). The journal conditions and posting definitions for the transactions should then be set up within [AFI](#).

Note: *It is recommended that journal conditions be first set up as under test and that they are thoroughly proven before they are set to live and [AFI](#) is activated.*

When [AFI](#) is activated, existing records are flagged so not to be extracted via [AFI](#). The assumption is made that manual journals will have been entered into the [General Ledger](#) if the data was required for GL prior to activating [AFI](#).

This install process sets the GL Update flag so that any previously created transactions do not get posted again.

The [AFI](#) application code for income transactions is EI.

Select **Confirm Submit (F8)** to submit the [job](#).

AFI Data Dictionary - Income Release

The following files, and their associated fields, are available for defining how selection and consolidation or both are to take place.

- Item Master
- Customer Details
- Sales Ledger Customer Master
- EQ Customer Details
- [Job](#) Header
- [Job Lines](#)
- Engineer Master File
- [Model](#) Master File
- Income Movement File
- Quantity Fields

The following fields are defined as quantities that are available to post.

- Income Movements
- Value Fields

The following fields on the Income Movement Detail file can be used to post a value to the [General Ledger](#):

- Income Movements

AFI Income Movement Extract - Test Mode [8/EQUA]

This program performs the same functionality as a live extract but no actual updating of data takes place within either Equipment Servicing or the [General Ledger](#). This is simply a simulation of the effect of creating the specified journals in the nominated [company](#) so that any errors in the journal conditions and rules can be rectified. This will allow selection of data to be tested against journal conditions.

Fields

Source Company

Enter the equipment servicing [company](#) from which income movement data is to be extracted.

Alternatively, use the prompt facility to select from the Select [Company](#) pop-up.

Work with Income Movements Not Yet Processed

Use this checkbox as follows:

- Unchecked - To specify a range of dates on which you wish to base the trial
- Checked - To extract data that has not been extracted in live operation mode by [AFI](#)

Work with Income Movements Between

If you did not **check** the Work with [Cost](#) Movements Not Yet Processed field, specify a range of transaction dates between which income movements in the source [company](#) are extracted for this trial.

Type of Journal Definition to Use

Select one of the following:

- Under Test - To use journals that are specified as being under test
- Under Live - To use journal definitions that are specified as being live
- Both - To use both test and live journal definitions

Consolidate Postings

Use this checkbox as follows:

- Unchecked - For no consolidation to take place, even though there may be journal postings defined as able to consolidate
- Checked - For consolidation to take place on those journal postings defined as able to consolidate

Select **Proceed (F8)** to submit the [job](#).

AFI Income Movements Extract Processing

The Equipment Servicing [AFI](#) Extract program processes all the Income Movement records that have been selected by the driver program which will have passed the [AFI](#) application code of EI. These income movement records will be tested against the journal conditions that have been specified in [AFI](#) for the application EI. If a journal condition is met, any posting definitions are examined and any rules applied. The values of the data dictionary fields used in the posting definition will be obtained by accessing the relevant logical files.

The files for this application include:

- [Sales Order Processing](#) Customer File (OEP20)
- Sales Ledger Customer File (SLP05)
- Inventory Parts File (INP35)
- EQ Customer File (EQP21)
- EQ Income Movements File (EQPER)
- EQ [Job](#) Header File (EQP54)
- EQ [Model](#) File (EQP30)

If the conditions on the journal are met, an [AFI](#) Transaction record will be written ready to be posted to the [General Ledger](#).

The values that are to be posted to the [General Ledger](#) are held on these transaction records. These values are dependent on the Value to Post field that has been specified on the journal. If a base currency field has been selected, [AFI](#) also writes the corresponding prime currency value to the [AFI](#) transaction record and vice versa. This is to ensure that both base and prime value fields are populated, irrespective of which field has been specified.

An [AFI](#) session is created, which will hold all the transactions that have been generated from the extract.

Install Link to AFI (Accrual Movements) [10/EQUA]

If you want to use [AFI](#) to post accrual information from Equipment Servicing to the [General Ledger](#), you must use this [task](#) to set up the Equipment Servicing details in the [AFI](#) files.

These include the module name, the logical files to be used and the database records to be accessed. The database identifies the files and the specific fields to be made available to [AFI](#). The journal conditions and posting definitions for the transactions should then be set up within [AFI](#).

Note: *It is recommended that journal conditions be first set up as under test and that they are thoroughly proven before they are set to live and [AFI](#) is activated.*

When [AFI](#) is activated, existing records are flagged so not to be extracted via [AFI](#). The assumption is made that manual journals will have been entered into the [General Ledger](#) if the data was required for GL prior to activating [AFI](#).

The EQ Initial Set-up program will be [called](#) to set the GL update flag to 1 on the Accrual file.

The application code for accruals is EA.

Select **Confirm Submit (F8)** to submit a [job](#) to install the necessary data in the [AFI](#) files.

Data Dictionary

The following files, and their associated fields, are available for defining how selection and consolidation or both are to take place.

- [Model](#) File
- Customer Details
- EQ Customer Details
- Accruals File

The following fields on the Accrual file can be used to post a value to the [General Ledger](#):

- Accruals

AFI Accrual Movement Extract - Test Mode

[11/EQUA]

This functionality is the same as a live extract but no actual updating of data takes place within either Equipment Servicing or the [General Ledger](#). This is simply a simulation of the effect of creating the specified journals in the nominated [company](#) so that any errors in the journal conditions and rules can be rectified.

The [AFI](#) Trial Extract prompt program will [call](#) the [AFI](#) accrual extract program and allow selection of data to be tested against the journal conditions created in [AFI](#).

Fields

Source Company

Enter the equipment servicing [company](#) from which accrual data is to be extracted.

Alternatively, use the prompt facility to select from the Select [Company](#) pop-up.

Work with Accruals Not Yet Processed

Use this checkbox as follows:

- Unchecked - To specify a range of dates on which you wish to base the trial
- Checked - To extract data that has not been extracted in live operation mode by [AFI](#)

Work with Accruals Between

If you did not **check** the Work with [Cost](#) Movements Not Yet Processed field, specify a range of transaction dates between which accruals in the source [company](#) are extracted for this trial.

Type of Journal Definition to Use

Select one of the following:

- Under Test - To use journals that are specified as being under test
- Under Live - To use journal definitions that are specified as being live
- Both - To use both test and live journal definitions

Consolidate Postings

Use this checkbox as follows:

- Unchecked - For no consolidation to take place, even though there may be journal postings defined as being able to be consolidated
- Checked - For consolidation to take place on those journal postings defined as being able to be consolidated.

Select **Proceed (F8)** to submit the [job](#).

AFI Extract Processing

The extract program will process all the accrual records that have been selected by the driver program. These records will be tested against the journal conditions that have been specified in [AFI](#) for the application EA. If a journal condition is met, any posting definitions are examined and any rules applied. The values of the data dictionary fields used in the posting definition will be obtained by accessing the relevant files.

The files for this application include:

- EQ Accruals File (EQPEU)
- Sales Ledger Customer File (SLP05)
- [Sales Order Processing](#) Customer File (OEP20)
- EQ Customer File (EQP21)
- EQ [Model](#) File (EQP30)

AFI Accrual Movement Extract - Live Mode [12/EQUA]

The Equipment Servicing Accrual [AFI](#) extract creates transactions for the revenue accrual records as defined on the journal conditions set up for Equipment Servicing Accruals. When the [AFI](#) to [General Ledger](#) Update [task](#) is selected, these are posted to the [General Ledger](#) as journals.

Note: *It is recommended that journal conditions be first set up as under test and that they are thoroughly proven before they are set to live and [AFI](#) is activated.*

This [task](#) initiates the extract of accrual transactions for processing by [AFI](#) to create [General Ledger](#) journals. A prompt window is displayed, which allows entry of the [company](#) from which you wish to extract accrual data to generate [General Ledger](#) journals. The [company](#) code entered will be validated against the Equipment Servicing [company](#) profile. In addition, a check is made to ensure that the application EA has been set up in the [AFI](#) control file and that the link for the application is active.

If the link is not active, the following window will be displayed:

Unprocessed accruals records are selected for processing and the [AFI](#) Extract program is [called](#). Any unprocessed accrual record will have a blank GL update field.

Press Enter to submit the [job](#).

AFI Extract Processing

The extract program processes all the accrual data that have been selected by the driver program. These records are tested against the journal conditions that have been specified in [AFI](#) for the

application EA. If a journal condition is met, any posting definitions are examined and any rules applied. The values of the data dictionary fields used in the posting definition are obtained by accessing the relevant files.

The files for this application include:

- EQ Accruals File (EQPEU)
- Sales Ledger Customer File (SLP05)
- [Sales Order Processing](#) Customer File (OEP20)
- EQ Customer File (EQP21)
- EQ [Model](#) File (EQP30)

If the conditions on the journal are met, an [AFI](#) Transaction record will be written, ready to be posted to the [General Ledger](#).

The values that are to be posted to the [General Ledger](#) will be held on these transaction records. These values are dependent on the Value to Post field that has been specified on the journal. If a base currency field has been selected, [AFI](#) will also write the corresponding prime currency value to the [AFI](#) transaction record. This is to ensure that both base and prime value fields are populated.

An [AFI](#) session will be created, which will hold all the transactions that have been generated from the extract.

The GL Update field on the Accrual record will be updated to indicate that the transaction has been processed.

Chapter 16 Enquiries

Enquire on Codes/Parameters [21/EQP]

Use this enquiry to view the parameter code details.

Codes/Parameters File Enquiry Selection Window

To display this window, select the Enquire on Codes/Parameters [task](#).

Use this window to select the parameter type and ID on which you want to enquire.

Fields

Parameter Type

Enter a parameter type.

Note: *Parameter type descriptions starting with * are system-required codes.*

Parameter ID

You can optionally enter the parameter ID for which you want to see details and then press Enter.

If you enter a parameter ID, you must also enter the relevant parameter type.

Enter a parameter type and then select **Code Selection (F15)** to display the Parameter Code Selection Enquiry window.

Parameter Code Selection Enquiry Window

To display this window, select a parameter type and then select **Code Selection (F15)** on the Codes/Parameters file Enquiry Selection window.

For each parameter ID, the code and description are displayed.

Select a parameter code to display the Codes/Parameters File Enquiry Window for IDs.

Codes/Parameters File Enquiry Window for IDs

To display this window, select a parameter code and a Parameter ID on the Parameter Code Selection Enquiry window or select a Parameter ID on the Parameter Code Enquiry window.

This window displays the set-up details for this parameter ID.

Below is a list of the parameter types and parameter IDs delivered with the Equipment Servicing application.

Select **Exit (F3)** to leave the enquiry.

List of Parameter Types

There are two types of codes: reserved codes, required by the software, and codes you can use and define. You can create additional parameters to control processing. For example, the Field to be Mandatory field is specific to parameter type VLDN and determines whether you must enter the technician and the fault code when you log a [call](#).

The parameter types available and where you use them are as follows:

ABSC

Technician Absent Codes

Code ID - one character

You must have 1 (Logged on) and 0 (Logged off). You can define other reasons for a technician's absence, for example, holiday or sickness.

ACTY

[Activity](#) Codes

Code ID - two numeric characters

You can define activities that can be attached to a staged payment schedule for a [job](#).

AWCD

Allowance Code

Code ID - two numeric characters

You can define allowances that can be attached to technician time sheets. This field is memo only on the [timesheet](#) function.

BUDF

[Budget](#) Forecast Code

Code ID - two numeric characters

You can define codes that will allow you to define different forecasts at the same [job](#) level for comparison.

BUDC

[Budget](#) Code

Code ID - two numeric characters

You can define codes that will allow you to define different [budgets](#) at the same [job](#) level for comparison.

CCAL

Customer Calendar Codes

Code ID - two characters

You can define alternative calendars that will be used by Equipment Servicing when calculating target date and times for [jobs](#). The [company](#) default calendar has a blank calendar code. If you create additional calendars, these can then be attached to customer, equipment or [contracts](#).

CCRC

[Contract](#) Cancellation Reason

Code ID - one character

You can define the reasons for cancelling a [contract](#), for example, too expensive.

CHST

* [Contract](#) Header Status

Code ID - one character

This defines the possible status of a [contract](#) header, for example, [quotation](#), active.

CLMT

Warranty Claim Type

Code ID - one character

This defines the warranty type, for example, labour, parts.

CLST

[Contract](#) Line Status

Code ID - one character

This defines the status of a [contract](#) line, for example, active, expired.

CODC

Condition Code (Accessories)

Code ID - one character

This defines the condition code for accessories. You should only use this on the accessory.

COLM

Collection Method

Code ID - two characters

This field is used by the system to define the way in which the equipment is to be transported to the workshop.

01 - Customer to transport equipment

02 - Workshop to collect equipment

These values should not be deleted.

CORA

[Model](#) Reporting Level 4

Code ID - three characters

You can define the codes that can be attached to the fourth level of the [model](#)/reporting hierarchy.

COST

[Cost](#) to Complete Code

Code ID - two characters

If you want to include a [job](#) in the [cost](#) to complete process, you must define a [cost](#) to complete code against it. This [job](#) is then included in the Initiate [Cost](#) to Complete [task's](#) batch [job](#).

If you have a large number of [jobs](#) to process in the Initiate [Cost](#) to Complete [task](#), this batch [job](#) could be a big [job](#). To split the processing into two, three or more batches, set up two, three or more [cost](#) to complete codes, and assign different ones to different [jobs](#). You can process only those [jobs](#) of a certain code.

CRDR

Credit Assessment Reason Code

Code ID - two characters

This defines the credit assessment, for example, credit not available, credit required. These are used by the system and should not be deleted.

CREA

[Call](#) Cancellation Reason

Code ID - two characters

You can define codes to identify reasons why you can cancel a logged [call](#), for example, customer cancelled, not covered by [contract](#).

CRTY

Credit Type

Code ID - one character

This defines the credit type, for example, credit not applicable, credit required.

CSHF

Shift Profile Code

Code ID - two characters

Use this to define different types of shift profile codes. These can be attached to working day type to identify the shifts working on that type of day. The code is then included in the target date and time calculation.

DAYS

*Day Name

Code ID - three characters

This defines a short description for days. It is used in the time allocation function.

DAYT

*Day Type

Code ID - one character

This defines the type of day, for example, working, non-working or bank holiday.

This is an important parameter when dates and times are being calculated. An additional flag on the parameter indicates whether the day type is a working or a non-working day. Non-working days are not included in date calculations.

There is also a deferred revenue check box. If this box is checked, [contract](#) revenue for a given [invoice period](#) will be divided up and deferred over the number of deferral days in the [invoice period](#).

DEFC

Defect Code

Code ID - one character

This defines the problem found with parts that have to be replaced during a repair, for example, loose wire, broken PCB.

DESM

Despatch Methods

Code ID - one character

This defines how you return the equipment to the customer, for example, courier, customer collected.

DFLT

* Equipment Servicing Defaults

Code ID - four character

This defines various defaults used by the Equipment Servicing Application.

DFDM

Default Despatch Methods

Code ID - one character

This defines the default despatch method, for example, courier.

DISC

Discount Reasons

Code ID - one character

This defines the reasons for a discount, for example, major account, no discount.

EDAY

Elapsed Days

Code ID - four characters

This defines elapsed days for a document before the system recommends follow up action, for example, warranty claim returns, letter or quote chasing days.

EGRD

Technician [Job](#) Grades

Code ID - two characters

This defines the technician grades, for example, senior technician, field technician. Technician grades can then, if required, be used to attach different [cost](#) and labour price lists to a [job](#). This field is used in the **Maintain Technician [task](#) [1/EQM]**.

EQST

Equipment Status

Code ID - one character

This defines the status of the equipment. This status is user-definable and is usually used to indicate loan, customer or demo equipment at the customer [site](#) using the **Maintain [Installation Details \[task\]\(#\) \[3/EQE\]](#)**.

ETAR

*Engr Assignment Error Codes

Code ID - two characters

This defines the error codes for automatic [call](#) assignment and the Resource Planner Board, for example, ACA not allowed for [company](#), unable to place [call](#) in queue.

FLTC

Faults

Code ID - three characters

This defines the codes that can be attached to the first level of the reporting hierarchy using the **Maintain Reporting Hierarchy [task](#)**.

GLPR

Global Price Increase Code

Code ID - two character

This defines the groups that could be used to implement a [contract](#) price increase, for example, dealer groups code, no price increase.

GLT

*GL Deferred Revenue Transaction Text

Code ID - one character

This defines the text transferred to [General Ledger](#) with the [contract](#) deferred revenue, for example, [service contract](#) number, service deferral.

GTXT

*General System Text

This is used in [contract](#) maintenance to change the description of the F22 function depending on the status of the [contract](#):

AC - **Accept [Contract](#) (F22)**

QU - **[Quotation](#) Only (F22)**

INVT

Settlement Discount Invoice Type

Code ID - one character

This defines the type of invoice appropriate for settlement discount, for example, [job](#) invoice, [contract](#) invoice.

JHST

*[Job](#) Header Status

Code ID - one character

This defines the status of the [job](#) header, for example, open, cancelled.

JLAB

*[Job Line](#) Abbreviated Status

Code ID - two characters

This defines the abbreviations for the [job line](#) status, for example, OPN, SCH, [WIP](#). This 3-letter abbreviation is visible in the **Work Control [task](#) [3/EQS]**.

JLST

*[Job Line](#) Status

Code ID - two characters

This defines the [job line](#) statuses, for example, 01 (customer to send equipment), 20 (open), 50 (complete) etc.

There are a number of additional control flags associated with this value:

Escalation Active

If this field is 1, this status will be included in the Escalation Reporting system if you use it.

Whole [Job](#) Status

If this field is blank, the status can be applied at individual line level. For example assignment (22) and scheduling (24) are usually applied at line level.

If the field is not blank, this status can only apply to the whole [job](#). For example Customer to Send (01) and Factory Claim Required (86) apply to the whole [job](#).

MROV

Reason for Override

Code ID - two characters

This defines the reason for a meter reading override, for example, meter change, previous actual incorrect.

MRSR

Meter Reading Source

Code ID - one character

This defines the methods used for getting the meter reading, for example, customer reading, technician reading.

MTHS

*Months Descriptions

Code ID - three characters

This defines the monthly descriptions used in various windows.

OPER

Physical Condition Code

Code ID - two characters

This defines the physical condition of the equipment, for example, scratched. It is input capable during equipment booking for workshop [jobs](#).

OWNP

Warranty Claim [Ownership](#) Code

Code ID - one character

This defines the warranty claim [ownership](#), for example, end customer. This is used during warranty claim creation.

PAYT

Payment [Terms](#)

Code ID - one character

This defines the payment [terms](#): for example, Payment Method No. 1. This function is not used in this release of the application.

PTCH

Geocode/Territory/Patch Description

Code ID - three characters

This defines the Geocode/Territory/Patch, for example, all territories for team *DF. This field is used in the Maintain FSG/Territory/Team [task](#).

REAS

Req Date Change Reason Code

Code ID - two characters

This defines the date change reason, for example, Date Input Mistake. This is primarily used by the fixed asset processing.

RECT

*Invoice Line Type

Code ID - two characters

This defines the type of lines being processed through [job](#) completion, pending invoice maintenance, invoicing and invoice enquiry, for example, fixed labour hours, parts.

REC2

*Invoice Line Type Short Description

Code ID - two characters

This defines the abbreviations for the invoice line types defined by parameter RECT: for example, FXD LBR, LBR HRS.

REGN

Regions

Code ID - two characters

This defines the regions for the workshop [branch](#), for example, Central, Southern. Other [tasks](#) that can have regions entered are Maintain Technician, Maintain [Contracts](#) and Maintain Additional Customer Details.

REPC

Repair Code

Code ID - one character

This defines the repair codes for parts used on a [job](#), for example, Replacement, Cleaned. These codes are normally entered in conjunction with a defect code.

RJCD

Warranty Claims Reject Code

Code ID - one character

This defines the reject reasons for warranty claims, for example, Invalid Account, Invalid [Location](#). At any point in the life of a claim it can be re validated and any faults found with the claim recorded as a series of reject codes.

Each code has additional flags associated with it that control whether the reject code can be manually overridden during warranty claim management.

RRES

Credit Release Reason

Code ID - one character

This defines the reasons for releasing the credit, for example, Payment Agreed, Life -threatening Problem. This code is mandatory when you are using the Maintain Credit [Calls task](#).

RVTY

Default Return [Visits](#)

Code ID - two characters

This defines the reason for return [visits](#). These codes can be recorded in the [timesheet](#) system. Examples of reason for return are: parts required, [job](#) not complete, customer [terminated visit](#).

SECT

Customer Description

Code ID - three characters

This defines the codes that can be attached to the second level of the reporting hierarchy using the **Maintain Reporting Hierarchy [2/EQM]** [task](#).

SJBN

Sub [Job](#) Codes

Code ID - three characters

If any values are set up, these will be the only codes allowed to be entered in a template structure and in [job](#) structure. If you do not set up any codes, you can enter any code when creating structures.

SRVC

*Special Revenue Categories

*SC - Sundry Credits

*SI - Sundry Invoices

SSCT

Customer Description

Code ID - three characters

This defines the codes that can be attached to the third level of the reporting hierarchy using the Maintain Reporting Hierarchy [task](#).

STA1

Statistical Family ([Models](#))

Code ID - three characters

This defines the statistical groups for the [models](#), for example, Imperial Measurement, Metric Measurement. If required, this code is attached via the **Maintain Model task [2/EQE]**. This can be used as a further non-hierarchical definition of the [model](#) (in addition to [division](#), [model](#) group, and [model](#) sub group).

S2SE

*Serious Error Codes

The only one defined is 01 (End of Calendar File Reached). This is printed out on the Serious Error report which can be run from the Report by Serious Errors [task](#).

TEAM

Team Description

Code ID - three characters

This defines the technician teams. Usually a technician is defined as being part of a team. The Maintain FSG/Territory/Team [task](#) associates team and technicians with [model](#) and customer attributes so that a team, and possibly a technician, can be retrieved as the [job](#) is being created.

TEMT

Template Type

Code ID - 1 character

This allows you to set up template type that can be used to differentiate between local and global templates.

TPER

[Timesheet](#) Period Days

Code ID - 2 characters (always 01)

This allows you to set up a number of days to allow [timesheets](#) and expenses to be entered where their transaction date is within this number of days previous to the current period.

TRFM

*[Transfer Method](#)

Code ID - 1 character

This indicates the way in which the [job](#) will post to the [General Ledger](#)

- 0 P&L
- 1 [WIP](#) - Month End

- 2 [WIP](#) - Release
- 3 [WIP](#) - Close & Rel
- 8 Hold

For a fuller description see the [AFI](#) chapter of this product guide.

TSKN

[Task](#) Codes

Code ID - three-digit numeric

If any values are set up, these will be the only codes allowed to be entered in a template structure and in a [job](#) structure. If no codes are set up, you can enter any code when creating structures.

TXTI

Standard Document Text

Code ID - two characters

This defines the text for standard documents, for example, Advice Note, Acknowledgement. Each text type will have a standard document template available for maintenance using the Maintain Standard Text [task](#).

These templates are then used throughout the system. For example, [quotations](#) are printed from the [quotation](#) module, acknowledgements are printed from [call](#) logging, etc.

TXTO

Text Destination Codes

Code ID - three characters

This defines the people to whom you can send text, for example, Sales [Manager](#), Operator. The text here is entered via the Maintain Standard Text [task](#) function. If text is entered with a destination and date, it will be printed out by the day end program on that date.

TYDS

*Billing Type Description

Code ID - two characters

This defines the type of billing allowed: for example, Fixed Service, Rental. This is displayed on the Billing Maintenance pop up used in [contract](#) header maintenance and will be printed on the [contract](#) invoice.

VSTP

[Scheduled Visit Profiles](#)

Code ID - three characters

This defines the quantity of [visits](#) produced using the [scheduled visit profile](#): for example, fortnightly, and monthly. The 3-character code should reflect the frequency of the [visits](#). Once a code is created, a schedule of [visits](#) can be associated with it.

WAIT

Wait Times for Sleeper [Jobs](#).

Code ID - one character

This defines the delay time for specific [jobs](#), such as Incoming Transaction Monitor used in remote communications.

WCLC

Warranty Claim Labour Credit

Code ID - three characters

This defines the warranty claim labour credit code. A number of code types can be set up and have [model](#), fixed rates and hourly rates associated with them using the Maintain Warranty Claim Labour Credit Note [task](#).

Each dealer eligible for payment must have a Warranty Claim Labour credit code associated with them using the Maintain Additional Customer Details [task](#) if you wish to compensate them for labour.

WRFL

Warranty Claim Flag

Code ID - one character

This defines the types of warranty claim allowed, for example, warranty parts claim allowed or labour and parts or labour only.

WVAL

Warranty Claim Value Limit

Code ID - PCVL

This allows you to define an upper limit for the value of a part listed on a warranty claim. If the parts value is greater than this value, the part will be requested from the dealer before a credit note is issued.

XTYP

*Text Types

Code ID - two characters

This defines the type of text allowed, for example, [job](#) story text, invoice text equipment text, etc.

ZONE

Zone Charge Description

Code ID - one character

This defines the codes for the mileage zones, for example, inner city, suburbs. If a customer is to be charged for mileage, it can be based on actual mileage driven, standard mileage from the nearest service [branch](#) or zones, where a zone code is associated with a charge and a customer.

240E

*[Job](#) History Enquiry Options

Code ID - two character

This defines the current available list of options that can be used in the Enquire on [Job History task](#).

240P

*Work Control Function List

Code ID - two characters

This defines the current available list of options that can be used in the **Work Control [task](#) [3/EQS]**.

320P

*Warranty Claim Function List

Code ID - two characters

This defines the current available list of options that can be used in the **Work Control [task](#) [3/EQS]**.

Enquire on Daily Calendar [22/EQP]

Use this [task](#) to enquire on the definition of working and non-working days and on service and payroll period end dates.

Daily Calendar File Enquiry Selection Window

To display this window, select the Daily Calendar File [task](#).

Use this window to select the calendar for which you want to see the details.

Fields

Year

Enter the year on which you want to enquire.

Press Enter to display the Period End Dates Enquiry window.

Period End Dates Enquiry Window

To display this window, enter a year and then press Enter on the Daily Calendar File Enquiry Selection window.

This window displays, for the calendar year selected:

For more details of these fields, see the Maintain Daily Calendar section.

Fields

1st Service Period - End Date

This field displays the date of the first [service period](#) end.

1st Payroll Period - End Date

This field displays the date of the first payroll period end.

Day Type

This field displays the day type of each day of the month. The day types define working days and non-working days.

Service Pd

There will be an **E** under the last day of a [service period](#). You can have more than one [service period](#) end in a calendar month.

Account Pd

There will be an **E** under the date which is the last day of a payroll period. You can set more than one payroll period end in a calendar month.

Note: To display other calendar months, use Page Up and Page Down.

Select **Exit (F3)** to leave the [task](#).

Enquire on Branch [23/EQP]

Use this [task](#) to enquire on the details of any service [branch](#) within a [company](#).

Branch File Enquiry Selection Window

To display this window, select the Enquire on [Branch task](#).

Branch Code

Enter a [branch](#) code using up to two alphanumeric characters.

Alternatively, use the prompt facility to select from the [Branch](#) Selection pop-up.

Select a [branch](#) or enter a [branch](#) code and then press Enter to display the [Branch](#) File Enquiry Detail window.

Branch File Enquiry Detail Window

To display this window, select a [branch](#) or enter a [branch](#) code and then press Enter on the [Branch](#) File Enquiry Selection window.

For more details on this window, see the Maintain [Branch](#) section in the [Company](#) Parameters Maintenance chapter of this product guide.

Functions

Location Enquiry (F14)

Use this to display all the [locations](#) for the [branch](#).

India Details (F17)

India only

Use this to display the India details for the [branch](#)

Location Code Enquiry Window

To display this window, select **Location Enquiry (F14)** on the [Branch](#) File Enquiry Detail window.

This window lists all the [locations](#) you can use for the [jobs](#). This is not connected to the [locations](#) available in the Inventory application. It is list of areas within the workshop described by a 6-character code. [Installation](#) maintenance can be used to indicate where the equipment is and the field is also available during [Call](#) Logging to record where the equipment has been put in the workshop. This field is not available for field service [jobs](#).

Select **Previous (F12)** to return to the [Branch](#) File Enquiry Detail window.

Indian Details Window

To display this window, select **India Details (F17)** on the [Branch](#) File Enquiry Detail window

Select **Previous (F12)** to return to the [Branch](#) File Enquiry Detail window

Enquire on Period End Dates [24/EQP]

Use this [task](#) to enquire on the [service period](#) end dates for a specific year.

Period End Dates Enquiry Selection Window

To display this window, select the Enquire on Period End Dates [task](#).

Use this window to select the year for which you want to display the period end dates.

Fields

Year

Enter the year on which you want to enquire.

Press Enter to display the Period End Dates Enquiry Detail window.

Period End Dates Enquiry Detail Window

To display this window, enter a year and then press Enter on the Period End Dates Enquiry Selection window.

This window displays all the [service period](#) numbers and end dates for the selected year. Whenever a service [call](#) is taken, the date and time of contact is used to access this table and update the [job](#) with the [service period](#).

Select **Exit (F3)** to leave the enquiry.

Enquire on Working Days Calendar [25/EQP]

This enquiry displays the day types for all twelve months in the year, for a selected calendar code and year.

Working Days Calendar File Enquiry Selection Window

To display this window, select the Enquire on Working Days Calendar [task](#).

Fields**Calendar Code**

Enter a valid calendar code.

Alternatively, use the prompt facility to select from the Customer Calendar Code pop-up.

Select a calendar code or enter a calendar code and then press Enter to display the Working Days Calendar File Enquiry Year window.

Working Days Calendar File Enquiry Year Window

To display this window, select a calendar code or enter a calendar code and then press Enter on the Working Days Calendar File Enquiry Selection window.

Options

Details

Use this to select the year on which you wish to enquire.

Select Details against a calendar code to display the Working Days Calendar File Enquiry Details window.

Working Days Calendar File Enquiry Details Window

To display this window, select Details against a calendar code on the Working Days Calendar File Enquiry Year window.

This window displays the day type for every day in the calendar year

Day types are used by the target date and time calculation routines in [call](#) logging which are used to calculate the target date and time of a [call](#) by adding the retrieved response hours onto the date and time of contact. This calculation may need to count a number of days and needs to identify if a day is a working day or not. It does this by accessing this table with the date, retrieve the day type and access the Codes/Parameters file, in which there is a flag to indicate whether the day is a working day or not.

Therefore, if a [call](#) is taken at 4:00 pm on a Friday with an 8-hour response time, the target date and time will be calculated as 3:00 pm on the following Monday assuming that Saturday and Sunday are non-working days and the service window is 8:00-15:00.

Select **Exit (F3)** to leave the enquiry.

Enquire on Tax Code [26/EQP]

Use this [task](#) to enquire on the tax codes which have been set up for a [cover type/job category](#) charge matrix within a specified country.

Tax Codes Enquiry Selection Window

To display this window, select the Enquire on Tax Code [task](#).

Fields

Cover Type

Enter an existing [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Country Code

Enter an existing country code.

Alternatively, use the prompt facility to select from the Select Country pop-up.

Press Enter to display the Tax Codes Enquiry Detail window.

Tax Codes Enquiry Detail Window

To display this window, press Enter on the Tax Codes Enquiry Selection window.

This window displays a table of [job](#) categories and associated (travel, miles, labour and miscellaneous) tax codes for a selected [cover type](#) and country.

These are the tax codes which apply to the [cover type/job category](#) charge matrix elements, set up for the selected [cover type](#) and country. They are used in [job](#) pricing and invoicing. They overwrite the account or [site's](#) Tax indicator and Tax code settings.

Fields

Job

This field displays the category of [job](#) that could have a different tax code from the customer's tax code.

Category

This field displays the description of the [job category](#).

TRV

This field displays a tax code that will be applied to travel hours on [jobs](#) with this [job category/cover type/country](#) code.

MLG

This field displays a tax code that will be applied to distance travelled on [jobs](#) with this [job category/cover type/country](#) code.

LBR

This field displays a tax code that will be applied to labour hours on [jobs](#) with this [job category/cover type/country](#) code.

MSC

This field displays a tax code that will be applied to expenses on [jobs](#) with this [job category/cover type/country](#) code.

Select **Exit (F3)** to leave the enquiry.

Enquire on Team Authorisation [27/EQP]

Use this [task](#) to enquire on which user IDs are authorised to which teams.

A user cannot progress any [jobs](#) in the Work Control [task](#) or on the Resource Planner board unless they are authorised to the team on a [job](#).

Team authorities are grouped into districts by this [task](#). Once a team has been authorised in a district, they cannot be authorised in another district.

Team Authorisation Enquiry Selection Window

To display this window, select the Enquire on Team Authorisation [task](#).

District Number

Enter a district code, using up to two alphanumeric characters.

Alternatively, use the prompt facility to select from the Selection of Teams within Districts pop-up.

Press Enter to display the Team Authorisation Detail window.

Team Authorisation Detail Window

To display this window, enter or select a district code and then press Enter on the Team Authorisation Enquiry Selection window.

This window displays users who have the authority to access teams in the Work Control [task](#). The table displays, for each district, the teams and team descriptions defined to the user IDs.

Fields

Team Number

This field displays a valid team code.

Description

This field displays the description of this team from the Codes/Parameters file.

User ID

This field displays the user able to maintain [jobs](#) for this team in the Work Control [task](#) and the Resource Planning [model](#).

Select **Previous (F12)** to return to the Team Authorisation Enquiry Selection window.

Enquire on Charge Codes [11/EQT]

Use this [task](#) to enquire on [charge codes](#). You specify [charge codes](#) at transactional level. You use [charge codes](#) to break down further entries against direct transactions and [employee expenses](#). You can include items such as hotel bills or postage [costs](#).

If you set up the [Sales Order Processing](#) charge in Equipment Servicing with an [expense type](#) and [transaction type](#), when you create a [Sales Order Processing](#) order within Equipment Servicing, the software automatically brings the [Sales Order Processing](#) order value across to Equipment Servicing as a [cost](#). Therefore, make sure that you also set up any Equipment Servicing [charge codes](#) you want to use in this way in [Sales Order Processing](#).

If you do not want to enter a [charge code](#), you can set up a blank code. This means you can enter a blank code for the parameter.

Charge Codes Enquiry Selection Window

To display this window, select the Enquire on [Charge Codes task](#).

Fields

Charge Code

Enter a [charge code](#).

Alternatively, use the prompt facility to select from the Select [Charge Code](#) pop-up.

Select a [charge code](#) or enter a [charge code](#) and then press Enter to display the [Charge Codes](#) Enquiry Detail window.

Charge Codes Enquiry Detail Window

To display this window, select a [charge code](#) or enter a [charge code](#) and then press Enter on the [Charge Codes](#) Enquiry Selection window.

Use this window to view the details for the [charge code](#).

Fields

Charge Code

This field displays the [charge code](#) entered on the [Charge Codes](#) Enquiry Selection window.

Description

This field displays the [charge code](#) description.

Expense Type

This field displays the associated [expense type](#). The software uses this [expense type](#) when it creates a transaction from [Sales Order Processing](#).

Transaction Type

This field displays the associated [transaction type](#). The software uses this [transaction type](#) when it creates a transaction from [Sales Order Processing](#).

Allow Zero Costs

This check box is used as follows:

Unchecked - If expenses and direct transactions cannot be entered without a [cost](#)

Checked - To allow entry of expenses and direct transactions that have a Charge but no [cost](#)

For example, this will allow administration charges to be applied to the [job](#).

Press Enter to return to the [Charge Codes](#) Enquiry Selection window.

Enquire on Transaction Sources [12/EQT]

Use this [task](#) to view the [transaction source](#) details.

When you create an Equipment Servicing [company](#), the software creates [transaction source](#) codes. These prefix Equipment Servicing transaction numbers, and identify the originating source of transactions logged against a [job](#):

If the [transaction source](#) is an associated module such as [Accounts Payable](#) or Inventory Management, the [transaction source](#) code is the ID of that module (PL for [Accounts Payable](#), IN for Inventory Management).

When you transfer a code, which is the prefix plus the transaction number, to [General Ledger](#), it is prefixed with the code J. This shows that the transaction is from Equipment Servicing.

When transferring the transaction within [General Ledger](#), for example, from Work in Progress to Profit and Loss, the J is kept, but the [transaction source](#) is changed:

Note: Within GL, [transaction sources](#) are known as [transaction types](#).

If necessary, you can define your own [transaction source](#) codes for transactions logged within Equipment Servicing.

Note: We strongly recommend that you use EQ as the [transaction source](#) for direct transactions within Equipment Servicing.

Transaction Source Enquiry Selection Window

To display this window, select the Enquire on [Transaction Sources](#) [task](#).

Fields

Transaction Source Code

Enter the [transaction source](#) code on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Transaction Source](#) pop-up.

Select a [transaction source](#) code or enter a [transaction source](#) code and then press Enter to display the [Transaction Source](#) Code Detail window.

Transaction Source Code Detail Window

To display this window, select a [transaction source](#) code or enter a [transaction source](#) code and then press Enter on the [Transaction Source](#) Code Selection window.

Use this window to view the details for the [transaction source](#) code.

Fields

Transaction Source

This field displays the [transaction source](#) selected.

Source Description

This field displays the description of the [transaction source](#) code.

Last Used Transaction Number

This field displays the last used document reference number for this [transaction source](#).

Equipment Servicing automatically generates a unique transaction number for each transaction. This number is incremented by one for each transaction.

Press Enter to return to the [Transaction Source](#) Code Selection window.

Enquire on Expense Types [13/EQT]

Use this [task](#) to enquire on [expense types](#).

Whenever you enter [cost](#) transactions against a [job](#), you must also enter an [expense type](#). [Expense type](#) transactions typically include materials, labour, accommodation, travel expenses etc.

You must assign a default [expense type](#) to each [timesheet](#), employee expense, travel distance, subcontract and inventory transaction.

You can analyse [costs](#) at each level by [expense type](#). This gives Equipment Servicing a very flexible, user-defined method of analysing [costs](#).

Expenses Type Enquiry Selection Window

To display this window, select the Enquire on [Expense Types task](#).

Fields

Expense Type

Enter the [expense type](#) on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Expense Type](#) pop-up.

Select an [expense type](#) or enter an [expense type](#) and then press Enter to display the Expenses Type Enquiry Detail window.

Expenses Type Enquiry Detail Window

To display this window, select an [expense type](#) or enter an [expense type](#) and then press Enter on the [Expense Type](#) Enquiry Selection window.

Use this window to view the details for the [expense type](#).

Fields

Expense Type

This field displays the selected [expense type](#).

Description

This field displays the [expense type](#) description.

Category

The software uses a different [cost](#) to complete method for each expense category.

This field displays the category for this [expense type](#), which will be one of the following:

Press Enter to return to the [Expense Type](#) Enquiry Selection window.

Enquire on Team Time Zone [17/EQT]

Use this [task](#) to enquire on team time zones.

Team Time Zone Enquiry Selection Window

To display this window, select the Enquire on Team Time Zone [task](#).

Fields**Team**

Enter the team on which you want to enquire.

Alternatively, use the prompt facility to select from the Team Description pop-up.

Enter or select a team and then press Enter to display the Team Time Zone Enquiry Detail window.

Team Time Zone Enquiry Detail Window

To display this window, enter or select a team and then press Enter on the Team Time Zone Enquiry Selection window.

Use this window to view the time zone override details for the team.

Fields**Time Zone**

This field displays the override time zone for the team.

Press Enter to return to the Team Time Zone Enquiry Selection window.

Enquire on Customer Account [31/EQE]

Use this [task](#) to enquire on the details of customer accounts.

Customer Account Enquiry Selection Window

To display this window, select the Enquire on Customer Account [task](#).

Use this window to select the customer account for which you want to display the details.

Fields**Customer Number**

Enter an existing customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Select a customer or enter a customer and then press Enter to display the Customer Account Enquiry Detail window.

Customer Account Enquiry Detail Window

To display this window, select a customer or enter a customer account number and then press Enter on the Customer Account Enquiry Selection window.

This window displays the customer details including:

Fields

Customer Details Tab

This displays the name, address and contact details.

Account Details Tab

Pay Terms

This is a single character code which defines the types of [terms](#) to be used. The following codes are used:

- D - Number of days from invoice date
- M - Number of months before payment
- P - Periodic range
- T - Extended payment [terms](#)

The second field, when used with code P, indicates the period range in number form.

The second field, when used with code D, holds the number of days in the format DDD or holds the month and the date in the format MDD for codes P and M.

If code T was specified, the second field holds the extended [terms](#) code. This is a code set up in the Cash Management application which defines a more or less complex pattern of payments.

Currency

This field displays the three-character currency code which is the normal trading currency of this customer. If this field is blank, this denotes that this customer normally trades in the base currency of the [General Ledger](#).

Cr. Limit

This field displays the commercial credit limit value, which is used by the [Sales Order Processing](#) application. The value is expressed in the [General Ledger](#) base currency.

The value of outstanding items and orders not suspended should be less than the credit limit; otherwise the orders will be suspended in [Sales Order Processing](#).

The credit limit can now be secured separately using the GL Field Level Security facilities.

Note: *The value of the credit limit will only be effective if major code CRDC in the Inventory Descriptions file is set up with minor code CRLV (Credit Check by Value) set to 1.*

Stop

One of the following is displayed:

Blank - For customers previously stopped this re-instates order processing and integrated invoicing processing.

X - This indicates a stopped customer. This does not inhibit any action in [Accounts Receivable](#), but is used in [Sales Order Processing](#) to prevent the despatch of goods. It is also available for use by integrated sales invoicing applications.

Insured

This field displays the insured credit limit value. This is a memorandum field only, and is not used by any application.

Cr. Resp.

This field displays the code of the controller responsible for this account.

Note: *If a credit controller is assigned, authority to the maintenance of suspend codes on an order can be managed, based on the credit controller. A credit controller is added to the statement address only, and applies to all [delivery addresses](#).*

Account Status

Under certain circumstances, an account may be flagged as being of a certain status.

The following status types are valid:

- D - Recommend for deletion
- S - Suspend trading
- U - Uncertain debt
- The customer's debt may not be paid. This status may eventually be changed to L.
- L - Legal status

The customer's affairs are in legal hands and any debt is unlikely to be collected.

These [status codes](#) relate to the Doubtful Debtors processing [tasks](#).

St. Addr. Code

If the statement for this customer account is to be sent to an address different from that which is contained within this record, the account of the required customer is displayed.

In. Addr.

If this customer data is being used by a sales invoicing application, this field may be used to hold the account code of an alternative invoice address.

Consol

One of the following is displayed:

Blank - If you can enquire and report upon individual transactions current for the customer

X - If you can consolidate transactions for this customer with the account indicated by the statement address code

This means that although transactions are raised against this account the updates will go to the parent account. If you enquire on this account you will not see any transactions. All items will appear on the enquiry of the parent account; the originating account can be seen from the Item Detail window.

Note: An alternative to consolidation is to use customer hierarchies.

Gen Ledger

This field displays the [General Ledger company](#) code.

Control A/C

This field displays the [General Ledger](#) Debtors control account, if it differs from that set up in the [company](#) profile. Once postings have been made to the customer's account the account cannot be changed.

Bank A/C

This field displays the [General Ledger](#) bank account for the customer, if it differs from that set up in the [company](#) profile.

Contra Co/Account

If you use contra accounting, this field displays the [Accounts Payable](#) ledger [company](#) which is attached to the same [General Ledger company](#) as the [Accounts Receivable](#) ledger [company](#).

The second part of this field displays the supplier account code in the [Accounts Payable](#) ledger with which this customer is related for contra accounting purposes.

Select **Exit (F3)** to leave the enquiry.

Enquire on Installation Address [32/EQE]

Use this [task](#) to enquire on customer [site](#) addresses.

Installation Address Enquiry Selection Window

To display this window, select the Enquire on [Installation Address task](#).

Use this window to select the customer and address for which you want to display the details.

Fields

Account Number

Enter the customer on which you want to enquire.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Note: To display a list of addresses for this customer, leave the Account Address field blank and then press Enter.

Account Address

Enter an existing customer address sequence.

Select a customer or enter a customer and an address and then press Enter to display the [Installation Address](#) Enquiry Detail window.

Installation Address Enquiry Detail Window

To display this window, select a customer or enter a customer and address code and then press Enter on the [Installation Address](#) Enquiry Selection window.

This window displays the address and contact details for the selected customer address.

For a description of the fields, please refer to the [Installation](#) Name and Address Detail Window section in the Customer and Equipment database chapter of this product guide

Press Enter to display the Customer Additional Details Enquiry windows.

For more details of these enquiry windows, see the Enquire on Customer Additional Details section.

Enquire on Customer Additional Details [33/EQE]

Use this [task](#) to enquire on Equipment Servicing settings for a customer [site](#) address.

You can also access the windows that make up this [task](#) from within the Enquire on Customer Account and Enquire on [Installation Address tasks](#).

Customer Additional Details Enquiry Account Selection Window

To display this window, select the Enquire on Customer Additional Details [task](#).

Use this window to select the customer for which you want to see the details.

Fields

Account Number

Enter the customer on which you want to enquire.

Press Enter to display the Customer Additional Details Enquiry Address Selection window.

Customer Additional Details Enquiry Address Selection Window

To display this window, press Enter on the Customer Additional Details Enquiry Account Selection window.

Use this window to select the customer address for which you want to see the details.

Fields

Location Code

Enter a [site](#) address for the selected customer.

Note: Leave this field blank and then press Enter to display a list of all the available addresses for the selected customer on the Customer Additional Details Enquiry Address List window.

Press Enter to display the Customer Additional Details Enquiry Customer Details Defaults window.

Customer Additional Details Enquiry Address List Window

To display this window, leave the [Location](#) Field blank and then press Enter on the Customer Additional Details Enquiry Address Selection window.

Use this window to select the customer address for which you want to see the details.

Fields

Location Code

Enter a [site](#) address for the selected customer.

Press Enter to display the Customer Additional Details Enquiry Customer Details Defaults window.

Customer Additional Details Enquiry Customer Details Defaults Window

To display this window, enter an address sequence and then press Enter on the Customer Additional Details Enquiry Address Selection window or on the Customer Additional Details Enquiry Address List window.

Fields

For more details on the fields, see the Maintain Additional Customer Details section in the Customer and Equipment Database chapter of this product guide.

Withholding tax

If Turkey function active only

This indicates whether the customer is subject to withholding tax on labour invoice lines

Functions

Trade Details (F5)

This is only displayed if you use [World Trade](#). Use this to display the [World Trade](#) details.

Press Enter to display the Customer Additional Details Enquiry Details window or select **Reselect Account/Code (F12)** to return to the Customer Additional Details Enquiry Selection window.

Customer Additional Details Enquiry Details Window

To display this window, press Enter on the Customer Additional Details Enquiry Customer Details Defaults window.

The information displayed includes the following:

Fields

For more details on the fields, see the Maintain Additional Customer Details section in the Customer and Equipment Database chapter of this product guide.

Press Enter display the Customer Additional Details Enquiry Customer Hours window.

Customer Additional Details Enquiry Customer Hours Window

To display this window, press Enter on the Customer Additional Details Enquiry Details window.

This window displays the customer's opening hours in 24-hour clock times. Between the From and To times for a day, the customer accepts service [calls](#).

Select **Exit (F3)** to leave the enquiry.

Enquire on Model [34/EQE]

Use this enquiry to display [model](#) details.

Model Enquiry Selection Window

To display this window, select the Enquire on [Model task](#).

Use this window to select the [model](#) for which you want to display the details.

Fields

Model

Enter an existing [model](#).

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Select a [model](#) or enter a [model](#) and then press Enter to display the [Model](#) Enquiry Details Hierarchy window.

Model Enquiry Details Hierarchy Window

To display this window, select a [model](#) or enter a [model](#) and then press Enter on the [Model](#) Enquiry Selection window.

Fields

Description

This field displays the description of the [model](#).

Division

This field displays the [division](#) for this [model](#), which acts as a high-level grouping for [models](#), used primarily to define rules for technician assignment, fault code hierarchies and [contract](#) rates.

Model Group

This field displays the [model](#) group within the [division](#) for this [model](#), which acts as a high-level grouping for [models](#), used primarily to define rules for technician assignment, fault code hierarchies and [contract](#) rates.

Model Sub Group

This field displays the [model](#) sub-group within the [division](#) for this [model](#), which acts as a high-level grouping for [models](#), used primarily to define rules for technician assignment, fault code hierarchies and [contract](#) rates.

Machine/Peripheral

This field displays one of the following:

0 - This defines the [model](#) as a piece of equipment against which you can log service [calls](#) and maintain its full details in the Maintain [Installation](#) Details [task](#). If there are Inventory item codes on the [model](#), [installation](#) details for the [model](#) number will be created automatically when you sell the associated item through [Sales Order Processing](#).

1 - This defines the [model](#) as a peripheral. You will not be able to log service [calls](#) against it and can only maintain it as a peripheral in the Maintain [Installation](#) Details [task](#), not as a piece of equipment. Although you can sell peripherals through [Sales Order Processing](#), the [Sales Order Processing](#) interface does not create peripheral details.

Labour Price List

If this field displays a labour price list, it will be used, but this field can be blank, as the labour may be being priced by a list further up in the labour price hierarchy.

Visit Profile Code

Equipment Servicing uses this code to generate the [visits](#) on a [contract](#). It looks for the relevant SVP according to the following hierarchy:

- 1 Use the SVP on the [contract](#) header.
- 2 If not found, use the [model](#) file SVP.
- 3 If not found, use the [model](#) group file SVP.
- 4 If not found, use the [company](#) profile SVP.
- 5 If not found, do not generate any [visits](#).

Note: If Equipment Servicing finds a [scheduled visit profile](#), it generates [visits](#) when you select the Generate [Visits](#) option on the [Contract](#) Equipment Maintenance Detail window.

Points

This is used to define the service index of the [model](#). Equipment Servicing uses this during automatic technician assignment, to select the technician if all other workload factors are equal.

Inventory Item Codes

This is a list of valid Inventory items. If there are Inventory item codes on the [model](#), [installation](#) details for the [model](#) number will be created automatically when you sell the associated item through [Sales Order Processing](#).

You do not include Inventory item codes on a peripheral.

Press Enter to display the [Model](#) Enquiry Details window.

Model Enquiry Details Window

To display this window, press Enter on the [Model](#) Enquiry Details Hierarchy window.

The information displayed on this window includes:

Fields

Van Kit Number to Fix

This field is for future development.

Av. Hours per Breakdown

This field displays the default [job](#) duration for breakdown [calls](#), in hours and minutes between 00:01 and 99:59. This field is mandatory unless the [model](#) is a peripheral.

Av. Hours per PM Visit

This field displays the default [job](#) duration for planned maintenance [jobs](#), in hours and minutes between 00:01 and 99:59. This field is mandatory unless the [model](#) is a peripheral.

Workshop Preparation

This field is for future development.

Technician Needed for Installation

This field is only relevant for machines, not for peripherals.

This checkbox is used as follows:

- Unchecked - Equipment Servicing will not automatically assign a technician for [installation](#).
- Checked - Equipment Servicing will automatically create an [installation job](#) for equipment sold through [Sales Order Processing](#), when you complete the [Sales Order Processing Transfer to EQ](#).

Manufacturers ID

This field displays the manufacturer's name, as set up in the Inventory Descriptions file, under major type MFID. This is a memorandum field only.

Warranty Months

This field displays the number of months warranty cover for this [model](#) and will default onto the [installation](#) record when a piece of equipment is created for this [model](#) number.

Volume Segment ID

This field indicates the volume segment to which this [model](#) number belongs. The volume segment contains the number of days, or units, that can be used to calculate a repeat [call](#) for this [model](#) in [call](#) logging.

Automatic Call Assignment

This field displays one of the following:

- 0 - If [calls](#) for this [model](#) are excluded from automatic [call](#) assignment
- 1 - If [calls](#) for this [model](#) are included in automatic [call](#) assignment (ACA)

ACA operation can also be limited by using the Maintain Codes/Parameters, Maintain [Job Category](#), and Maintain Technician [tasks](#).

Statistical Family Fields 1 to 3

These fields are for memo or reporting purposes.

Note: You define the codes in Codes/Parameters file, under type STA1.

Target Mean Repair Time

This field displays a [model](#) standard for target mean repair time. It can be used in reports to compare with actual repair times.

Target Days between Visits

This field displays a [model](#) standard for target number of days between mean repair time. You can use this in reports to compare with actual repair times.

Number of Billing Meters

This field displays the number of billing meters for the [model](#).

Note: Although up to 99 meters can be tracked, only meter numbers 01 and 02 can be used for [contract billing](#).

Number of Counting Meters

This field displays the number of meters for the [model](#), in the range 0 to 99.

Warranty Units Meter 1

This field displays the agreed number of units covered by the warranty. This will be a positive whole number.

Once this number of units is exceeded, any [calls](#) logged that are created as warranty [calls](#) will be suggested for change to breakdown [jobs](#).

Press Enter to display the next window. If the Number of Billings Meters field is blank, the [Model Enquiry Details Workshop](#) window will be displayed. If the field displays a value greater than 0, the [Model Enquiry Meters Details](#) window will be displayed.

Model Enquiry Meters Details Window

To display this window, press Enter on the [Model Enquiry Details](#) window if there is a value greater than 0 in the Number of Billing Meters field.

Use this window to display meter information for the [model](#).

Fields

No.

This field displays the meter number.

Description

This field displays a description of the meter.

Mandatory

This field displays **1** if an entry for this meter is mandatory. If the reading for the meter is mandatory, each time readings are entered, the user will be forced to enter readings for the mandatory meters.

Number of Digits

This field displays the total number of digits on the meter.

Note: *Equipment Servicing uses these values to check for meter roll over when it reaches its maximum reading.*

Billing

This field displays 1 if this is a billing meter. Only meter numbers 01 and 02 can be billable. Any meter beyond 02 is a counting meter only.

Press Enter to display the [Model](#) Enquiry Details Workshop window.

Model Enquiry Details Workshop Window

To display this window, press Enter on the [Model](#) Enquiry Details window or on the [Model](#) Enquiry Meters Details window, if it was displayed.

Fields**Parts Price List**

This field displays the parts price list to use for this [model](#) during [job](#) billing.

Estimate/Quotation Required

The valid values are as follows:

- 0 - You do not require either an estimate or [quotation](#).
- 3 - You require an estimate.
- 4 - You require a [quotation](#).

Serial Number Mandatory at Job Creation

This field is used as follows:

- 0 - A [serial number](#) is not required to book a [job](#) for this [model](#).
- 1 - A [serial number](#) is required to book a [job](#) for this [model](#).

Accessory List Code

This field displays the accessory list for this [model](#).

Certification Required

This is a memo field.

This field is used as follows:

- 0 - Certification is not required.
- 1 - Certification is required.

% Tolerance for Estimates on Customer Stock

This function is not used in this release of the product.

Value at this Level

This function is not used in this release of the product.

% Tolerance for Estimates on Own Stock

This function is not used in this release of the product.

Estimate Creation Fee

This function is not used in this release of the product.

Fixed Price Charge

This function is not used in this release of the product.

Warranty Months

This checkbox is used as follows:

- Unchecked - There are no warranty months for this [model](#).
- Checked - There are warranty months for this [model](#). These months will be defaulted into any [installations](#) created for this [model](#).

Warranty Claims

This checkbox is used as follows:

Unchecked - Warranty claims are not allowed against this [model](#).

Checked - Warranty claims are allowed against this [model](#).

Default Labour Credit Model for Claims

This checkbox is used as follows:

- Unchecked - This is not the default labour credit [model](#) for warranty claims.
- Checked - This is the default labour credit [model](#) for warranty claims.

Only a single [model](#) within the system can have this field checked.

Functions**Warranty Parts (F14)**

Use this to display all spare parts covered by this machine's warranty. The Warranty Parts Enquiry pop-up is displayed.

Select **Exit (F3)** to leave the enquiry.

Warranty Parts Enquiry Pop-up

To display this pop-up, select **Warranty Parts (F14)** on the [Model](#) Enquiry Details Workshop window.

This pop-up displays a list of all the parts covered by this machine's warranty.

Select **Previous (F12)** to return to the [Model](#) Enquiry Details Workshop window.

Enquire on Installation Details [35/EQE]

Use this [task](#) to enquire on the equipment held on customer [sites](#).

Installation Details Enquiry Selection Window

To display this window, select the Enquire on [Installation](#) Details [task](#).

Use this window to select the [installation](#) for which you want to display the details.

Fields

Model

Enter the [model](#) on which to enquire.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Do not select a peripheral; you enquire on those on the Equipment Detail Enquiry window.

Serial Number

Enter a [serial number](#).

Note: If you only enter a [model](#) number, a list of all [serial numbers](#) for this [model](#), with the associated account or [locations](#), is displayed on the Equipment by [Model](#) window.

Site

Account Number

Enter an existing customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Account Address

Enter an address sequence for the specified customer.

Owner

Account Number

Enter an existing customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Account Address

Enter an address sequence for the specified customer.

All Branches

Use this checkbox as follows:

- Unchecked - To display the [installation](#) details for the default [branch](#)
- Checked - To display the [installation](#) details for all the [branches](#)

Functions

Address (F15)

Enter a [site](#) name and address and then use this to display the [Installation Address](#) Enquiry window. Enter the [owner](#) name and address and then use this to display the [Ownership](#) Address Enquiry window.

Machine (F16)

Enter a [site](#) name and address and then use this to display the [Installation](#) Equipment Enquiry window. Enter the [owner](#) name and address and then use this to display the [Installation](#) Equipment by [Owner](#) Enquiry window.

Enter the [model](#) and [serial number](#) and then press Enter to display the Equipment Detail Enquiry window.

Installation Address Enquiry Window

To display this window, select **Address (F15)** on the [Installation](#) Details Enquiry Selection window.

Fields

For more details on the fields, see the [Installation](#) Name and Address Detail Window section in the Customer and Equipment Database chapter of this product guide.

Functions

Text (F21)

Use this to display the [site](#) address text.

Select **Previous (F12)** to return to the [Installation](#) Details Enquiry Selection window.

Installation Equipment Enquiry Window

To display this window, select **Machine (F16)** on the [Installation](#) Details Enquiry Selection window.

Fields

For more details on the fields, see the [Installation](#) Equipment Maintenance Window section in the Customer and Equipment Database chapter of this product guide.

Functions

Address (F15)

Use this to display the [Installation Address](#) Enquiry window.

Select **Previous (F12)** to return to the [Installation](#) Details Enquiry Selection window.

Equipment Detail Enquiry Window

To display this window, select a [model](#) and [serial number](#) and then press Enter on the [Installation](#) Details Enquiry Selection window.

Alternatively, select an equipment line on the Equipment by [Model](#) window.

The information displayed includes:

Functions

Warranty Parts (F10)

Use this to display the Equipment/Warranty Part Enquiry pop-up.

Site Address (F15)

Use this to display the [Installation Address](#) Enquiry window.

Owner Address (F17)

Use this to display the [Installation Address](#) Enquiry window.

Ref (F19)

Use this to Alternate [Installation](#) References Enquiry window.

Peripherals (F20)

Use this to display the Equipment Peripherals Enquiry window.

Text (F21)

Use this to display any existing text.

Messages (F23)

Use this to display any existing machine messages.

Select **Exit (F3)** to leave the enquiry.

Equipment/Warranty Part Enquiry Pop-up

To display this pop-up, select **Warranty Parts (F10)** on the Equipment Detail Enquiry window.

This pop-up displays all the parts included in this [installation](#). It shows for each part:

Select **Previous (F12)** to return to the Equipment Details Enquiry window.

Equipment Peripherals Enquiry Window

To display this window, select **Peripherals (F20)** on the Equipment Detail Enquiry window.

This window displays the [model](#), [serial number](#), [installation](#) date and quantity of peripherals for the selected [model](#).

Fields

For more details on the fields, see the Machine Configuration Window section in the Customer and Equipment Database chapter of this product guide.

Functions

Fold/Truncate (F13)

Use this to toggle between displaying the [model](#) description and the codes.

Text (F21)

Use this to display any existing text for the peripheral.

Select **Previous (F12)** to return to the Equipment Detail Enquiry window.

Machine Messages Pop-up

To display this pop-up, select **Messages (F23)** on the Equipment Detail Enquiry window.

This pop-up displays any messages for the selected [model](#).

Fields

For more details on the fields, see the Machine Messages Pop-up section in the Customer and Equipment Database chapter of this product guide.

Select **Previous (F12)** to return to the Equipment Detail Enquiry window.

Enquire on Division Code [36/EQE]

Use this [task](#) to enquire on the [divisions](#) for a [model](#) family.

Division Enquiry Selection Window

To display this window, select the Enquire on [Division](#) Code [task](#).

Fields

Division Code

Enter the [division](#) on which you want to enquire.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Select a [division](#) or enter a [division](#) code and then press Enter to display the [Division](#) Enquiry window.

Division Enquiry Window

To display this window, select a [division](#) or enter a [division](#) code and then press Enter on the [Division](#) Enquiry Selection window.

Fields

For more details on the fields, see the Maintain [Division](#) Code section in the Customer and Equipment Database chapter of this product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on Model Group [37/EQE]

Use this [task](#) to enquire on the [model](#) groups for a [model](#) family.

Model Group Enquiry Selection Window

To display this window, select the Enquire on [Model](#) Group [task](#).

Fields**Division Code**

Enter the [division](#) on which you want to enquire.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter the [model](#) group on which you want to enquire.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Enter or select an existing [division](#) and [model](#) group to display the [Model](#) Group Enquiry window.

Model Group Enquiry Window

To display this window, enter or select a [division](#) and [model](#) group on the [Model](#) Group Enquiry Selection window.

Fields

For more details on the fields, see the Maintain [Model](#) Group section in the Customer and Equipment Database chapter of this product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on Model Sub-group [38/EQE]

Use this [task](#) to enquire on the [model](#) sub-groups for a [model](#) family.

Model Sub-Group Enquiry Selection Window

To display this window, select the Enquire on [Model](#) Sub-group [task](#).

Fields

Division Code

Enter the [division](#) on which you want to enquire.

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter the [model](#) group on which you want to enquire.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Model Sub-Group

Enter the [model](#) sub-group on which you want to enquire.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

Enter or select a [division](#), [model](#) group and [model](#) sub-group and then press Enter to display the [Model](#) Sub-group Enquiry window.

Model Sub-Group Enquiry Window

To display this window, enter or select a [division](#), [model](#) group and [model](#) sub-group on the [Model](#) Sub-group Selection window.

The information displayed includes the following:

For more details on the fields, see the Maintain [Model](#) Sub-Group section in Customer and Equipment Database chapter of this product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on Volume Segment [39/EQE]

Use this [task](#) to enquire on the usage volume, and the basis for repeat [call](#) calculations, for equipment at [model](#) level.

Equipment usage volume influences both the response time for [calls](#) and the calculation to determine whether a subsequent [call](#) is a repeat [call](#).

Volume Segment Enquiry Selection Window

To display this window, select the Enquire on Volume Segment [task](#).

Use this window to select a volume segment on which to enquire.

Fields

Volume Segment

Enter the volume segment on which you wish to enquire.

Alternatively, use the prompt facility to select from the Volume Segments pop-up.

Select a volume segment or enter a volume segment code and then press Enter to display the Volume Segment Enquiry window.

Volume Segment Enquiry Window

To display this window, select a volume segment or enter a volume segment code and then press Enter on the Volume Segment Enquiry Selection window.

Fields

For more details on the fields, see the Maintain Volume Segment section in Customer and Equipment Database chapter of this product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on Zone Charges [40/EQE]

Use this [task](#) to enquire on the zone charges.

Zone Charges Enquiry Selection Window

To display this window, select the Enquire on Zone Charges [task](#).

Use this window to select a zone charge on which to enquire.

Fields

Zone Charge

Enter the zone charge on which you wish to enquire.

Alternatively, use the prompt facility to select from the Zone Charge Description pop-up.

Currency Code

Enter the currency on which you wish to enquire.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Enter or select a zone charge and currency and then press Enter to display the Zone Charge Enquiry window.

Zone Charge Enquiry Window

To display this window, enter or select a zone charge and currency and then press Enter on the Zone Charge Enquiry Selection window.

This window displays the zone charges and effective dates.

Select **Exit (F3)** to leave the enquiry.

Enquire on Accessory Code [41/EQE]

Use this [task](#) to display the defined lists of standard accessories.

You can specify which accessory list a [model](#) uses. When you book that [model](#) into the workshop, Equipment Servicing looks at the accessory list, and if it identifies any item on the list as Supply Required, warns you that you should not process the [job](#) any further until you receive the accessory.

Accessories Code Enquiry Selection Window

To display this window, select the Enquire on Accessory Code [task](#).

Fields

Accessory Code

Enter an accessory list.

Alternatively, use the prompt facility to select from the Accessory Selection pop-up.

Select an accessory list or enter an accessory list and then press Enter to display the Accessories Code Enquiry Details window.

Accessories Code Enquiry Details Window

To display this window, select an accessory list or enter an accessory list and then press Enter on the Accessories Code Enquiry Selection window.

For more details on the fields, see the Maintain Accessory Code Maintenance section in the Customer and Equipment Database chapter of this product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on Contracts [11/EQC]

Use this [task](#) to enquire on the details of [service contracts](#), and [quotations](#) for [contracts](#).

Contract Enquiry Selection Window

To display this window, select the Enquire on [Contracts task](#).

Fields

Contract Number

Enter a valid [contract](#) number.

The [contract](#) number must exist already, if you do not enter the account number and address code.

If you enter only the [contract](#) number, the software displays a list of all [contracts](#) with this number in [contract type](#) and start date sequence.

Contract Type

Enter the [contract type](#) code for the entered [contract](#) number.

Alternatively, use the prompt facility to select from the [Contract Type](#) Selection pop-up.

If you only enter a [contract](#) number and [contract type](#), the software displays a list of all [contracts](#) with this number and type, in start date sequence.

Account Number

Enter a valid customer.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If you enter the customer without an address code, the software displays a list of all address codes for this account.

If you do enter an address code, the software displays a list of all [contracts](#) with this account number and address code.

Account Address

Enter the address code of the customer you have entered.

If you only enter the account number and address code, the software displays a list of all of the [contracts](#) at that address, in [contract](#) number, [contract type](#) and start date sequence.

Enter your selection criteria and then press Enter to display the [Contract](#) Selection window.

Contract Selection Window

To display this window, press Enter on the [Contract](#) Enquiry Selection window.

Use this window to select an existing [contract](#).

Options

Select

Use this to display the [Contract](#) Header Enquiry Detail window for the selected [contract](#). This is the default option.

Contract Header Enquiry Detail Window

To display this window, select a [contract](#) on the [Contract](#) Selection window.

Fields

Alt Cont No

This field displays up to seven alphanumeric characters for an alternative [contract](#) number.

Version

This field displays up to five alphanumeric characters for the version number.

Contract Type

This field displays the [contract type](#).

Status

This field displays the [contract](#) header status. These codes are set up in the Codes/Parameters file [task](#), under parameter type CHST.

The status can be one of the following:

Contract Start Date

The [contract](#) will be made active by the Day End Routines [task](#) when this start date is reached.

End Date

The software calculates this date by adding the [contract](#) duration to the [contract](#) start date.

The [contract](#) will be expired by the Day End Routines [task](#) when its [contract](#) end date is reached.

If the [contract](#) duration is 0, the software assumes that the [contract](#) is rolling, with an end date displayed as 99/99/99.

Invoice Start

This field displays the date on which the first invoice for the [contract](#) was raised.

Calendar Code

If this [contract](#) is associated with a calendar, that calendar is displayed here.

Tot. Contract Value

This field displays the total value of the fixed service charges, entered in the [Contract Conditions](#) pop-up of each [contract](#) equipment line. It is the annualised, or [term's](#), nominal value of the service elements of a [contract](#), but is not used for invoicing.

No value can be displayed in advance of the [contract](#) start date, or of the effective date(s) for the equipment prices.

The total does not necessarily reflect the invoice value of the [contract](#), if equipment is added or deleted during the course of the [billing term](#).

Header Price

The field literals are only displayed if the Header Level Pricing field is **checked** on this window.

This field displays the header price to be invoiced for the [contract](#), as entered in the [Contract](#) Header Conditions. This can be compared with the total [contract](#) value: the nominal price displayed from the total of the [contract](#) lines.

Duration

This displays the [contract](#) duration in months up to a maximum of 120.

If the [contract](#) duration is 0, the software assumes the [contract](#) is never-ending, or rolling, and gives it an end date of 99/99/99.

Mantle Code

This field displays a user-defined mantle code of up to five alphanumeric characters, set up under parameter type MANT in the Inventory Descriptions file.

The mantle code is used in the Global Price Update [task](#), to identify a group of [contracts](#) for a percentage price change.

Customer Order Ref 1

This is a memo field to hold a customer reference number for the [contract](#) creation.

Order Ref Date

This date is associated with the customer reference number. The customer reference is valid from this date.

Customer Contact

This field defaults from the [site](#) additional details Contact field, but may have been overwritten. The field holds the name of the contact to whom enquiries relating to this [contract](#) should be addressed.

Telephone No

This field defaults from the [site](#) additional details, but may have been overwritten.

Renew Contract

If this field has been **checked**, the [contract](#) will be renewed automatically on its [termination](#) date by the [Contract](#) Renewal [task](#).

***Note:** This indicator has no effect if you set the [contract](#) end date to 99/99/99, because it is then a never-ending [contract](#).*

Region

This field displays the service region from the additional service details file for the [site](#).

Non-posting Invoices

One of the following is displayed:

- 0 - If invoices are posted to [Accounts Receivable](#) and the [General Ledger](#)
- 1 - If the [contract](#) functions as normal, but invoices produced stay within Service Management and are not posted to [Accounts Receivable](#) and the [General Ledger](#)

Header Level Pricing

If this field is **unchecked** and there is a price on the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up, the software defaults that price into the [Contract Conditions](#) pop-up for each piece of equipment added to the [contract](#). The price entered is acting as a default.

If this field is **checked**, a price must be entered in the [Contract](#) Header Maintenance [Contract Conditions](#) pop-up before you can update the [contract](#) header. This field displays the price that

will be charged for the [contract](#), irrespective of how many pieces of equipment are added to the [contract](#).

Note: If this field is checked, any prices you enter into [contract](#) equipment conditions pop-ups will be ignored. They can only be used for comparison purposes, as their total is displayed in the Tot [Contract](#) Value field.

Salesman Code

This field displays the salesman from the customer account.

Direct Debit

This field is for future development.

Invoice Summ/Det Form

This field is for future development.

Header Currency

If this field is left **unchecked**, the equipment on the [contract](#) is invoiced in the currency of the [site](#) where the equipment is installed.

If this field is checked, the equipment on the [contract](#) is invoiced in the currency of the account header.

Note: Some of the fields on the header window are only displayed if you have selected that particular function on the [contract type](#).

Invoice Destination

This field displays the customer and address.

The narrative address is retrieved for printing on all invoices and credit notes for the [contract](#).

Labour Price List

This field displays the labour price list that will be used to price [jobs](#) for [contract](#) equipment, if neither [contract](#) line conditions nor the [contract](#) equipment has a labour price list specified.

If this is blank, pricing will use a labour price list that is lower in the hierarchy.

Contract Inv Bill To

[Contract](#) invoices are sent to this account number and its associated address code.

Parts Price List

This field displays the parts price list that may be used to price [jobs](#) for equipment on the [contract](#).

Job Invoice Bill To

The software will send [job](#) invoices to this account number and its associated address code.

Parts Discount List

This field displays the discount list that may be used to discount prices on [jobs](#) for equipment on the [contract](#).

Functions

Detail (F8)

Use this to display the detail of the [contract's](#) equipment lines on the [Contract](#) Equipment Enquiry Detail window.

Service (F14)

Use this to display the Service Parameters pop-up.

Billing Enquiry (F16)

Use this to display the Billing Parameters pop-up.

Conditions Enq (F18)

Use this to display the [Contract Conditions](#) pop-up.

Text (F21)

Use this to display any text associated with this [contract](#).

Invoice Enquiry (F23)

Use this to display the [Contract](#) Billing History window.

Select **Detail (F8)** to display the [Contract](#) Equipment Enquiry Detail window.

Service Parameters Pop-up

To display this pop-up, select **Service (F14)** on the [Contract](#) Header Enquiry Detail window.

Fields

Response Hours

This field displays the response time for the [contract](#); it applies to all [contract](#) lines, unless a line is given its own special response time.

Schedule Visit Profile

The [scheduled visit profile](#) generates the [visits](#) to each piece of equipment on a [contract](#). The software selects the [scheduled visit profile](#) according to the following hierarchy:

If you have edited a [scheduled visit profile](#) on a [contract](#), the profile code displays as *OV. This indicates that a standard profile has been overridden.

Use Scheduled Visit Override at Renewal

This field is only displayed if a schedule [visit](#) override has been put in place during [contract](#) maintenance.

One of the following is displayed:

0 - If at [contract](#) renewal the [scheduled visit profile](#) hierarchy will determine the equipment [visits](#) to be generated on the renewed [contract](#)

1 - If at [contract](#) renewal the software will use the *OV amendments to the [scheduled visit profile](#), and equipment [visits](#) will be generated using that edited profile

Allow Service Cover When Contract Pending

If this field is left **unchecked**, [contract](#) cover is effective from the [contract](#) start date.

If this field is **checked**, all [calls](#) that are logged before the [contract](#) start date (while the [contract](#) has a status of Pending) will be treated as though the [contract](#) cover was effective. This is reflected on the [Job Line](#) Details window.

Use Start Date Rates

If this field is left **unchecked**, labour rates and parts prices will be those effective on either the date the [call](#) was placed or the date of the engineer's [visit](#).

If this field is **checked**, labour rates and parts prices will be those effective at the [contract](#) start date.

Or, Until (Date)

If the Use Start Date Rates field is left **unchecked**, a valid date is displayed. The labour and parts price lists used for chargeable work, effective at the [contract](#) start date, will only be used until this date.

After this date, the price lists used will be those effective on the date the work was carried out.

Global Price Update Code

This field displays the global price. The code is used in the Global Price Update [task](#), to select [contracts](#) for inclusion in the price revision then being applied.

You can set up these codes under the parameter type GLPR, in the Maintain Codes/Parameters [task](#).

Select **Previous (F12)** to return to the [Contract](#) Header Enquiry Detail window.

Billing Parameters Enquiry Pop-up

To display this pop-up, select **Billing Enquiry (F16)** on the [Contract](#) Header Enquiry Detail window.

All fields displayed are from the time the [contract](#) is invoiced

Fields

Fixed Service Chrg

Term (Mths)

The [term](#) is expressed in months; it defaults to a value of 12, but may be set to one to 120 months (that is, a 10-year maximum).

The [term](#) is the number of months within the [contract's](#) duration for which the [contract](#) price is protected from change and the number of periods covered by the fixed service charge.

Freq (Mths)

This field displays the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month [term](#).

Entries will be between 0 and the maximum number in the [term](#), and equally divisible into the [term](#).

Advance/Visit/Arrears

One of the following is displayed:

- **Advance** - If the release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the [term](#) starts
- **Visit** - If the release date is after the scheduled [visit](#)
- **Arrears** - If the release date is the end of the [invoice period](#)

In this case, the invoice for each [invoice term](#) is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

Next Pricing Cycle From

This field displays the anniversary date of the first invoice, which will be the date on which the next pricing cycle will start.

Next Pricing Cycle To

This field displays the end date of the next [contract term](#).

Rental Charge

Term

The [term](#) is expressed in months; it defaults to a value of 12, but may be set to one to 120 months (that is, a 10-year maximum).

The [term](#) is the number of months within the [contract's](#) duration for which the rental price is protected from change and the number of periods covered by the rental charge.

Freq

This field displays the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month [term](#).

Entries will be between 0 and the maximum number in the [term](#), and equally divisible into the [term](#).

Advance/Visit/Arrears

One of the following is displayed:

Advance - If the release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the [term](#) starts

Visit - If the release date is after the scheduled [visit](#)

Arrears - If the release date is the end of the [invoice period](#)

In this case, the invoice for each [invoice term](#) is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

Next Pricing Cycle From

This field displays the anniversary date of the first invoice, which is the date on which the next pricing cycle will start.

Next Pricing Cycle To

This field displays the end date of the next [contract term](#).

Pre-billing Charge**Term**

This field is not applicable and is always blank.

Invoice Frequency

This field displays the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month [term](#).

Entries will be between 0 and the maximum number in the [term](#), and equally divisible into the [term](#).

Advance/Visit/Arrears

One of the following is displayed:

Advance - If the release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the [term](#) starts

Visit - If the release date is after the scheduled [visit](#)

Arrears - If the release date is the end of the [invoice period](#)

In this case, the invoice for each [invoice term](#) is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

Next Pricing Cycle From

This field displays the anniversary date of the first invoice, which the date on which the next pricing cycle will start.

Next Pricing Cycle To

This field displays the end date of the next [contract term](#).

Interim Charge**Term**

This field is for future development.

Freq

This field displays the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month [term](#).

Entries will be between 0 and the maximum number in the [term](#), and equally divisible into the [term](#).

Advance/Visit/Arrears

The following is displayed:

Arrears - If the release date is the end of the [invoice period](#)

In this case, the invoice for each [invoice term](#) is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

Next Pricing Cycle From

This field displays the anniversary date of the first invoice, which is the date on which the next pricing cycle will start.

Next Pricing Cycle To

This field displays the end date of the next arrears invoicing period, which is set by the interim charge [invoice frequency](#). It may only be for a three-month period, for example.

Reconciliation Charge**Term**

The [term](#) is expressed in months; it defaults to a value of 12, but may be set to one to 120 months (that is, a 10-year maximum).

The [term](#) is the number of months within the [contract's](#) duration, for which the [contract](#) price is protected from change.

Freq

This field displays the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month [term](#).

Entries will be between 0 and the maximum number in the [term](#), and equally divisible into the [term](#).

Advance/Visit/Arrears

The following is displayed:

Arrears - If the release date is the end of the [invoice period](#)

In this case, the invoice for each [invoice term](#) is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

Next Pricing Cycle From

This field displays the anniversary date of the first invoice, which will be the date on which the next pricing cycle will start.

Next Pricing Cycle To

This field displays the end date of the next arrears invoicing period, which is set by the reconciliation charge [invoice frequency](#). It may only be for a three-month period, for example.

Note: Only those billing parameters that you have selected for this [contract type](#) are displayed.

Select **Previous (F12)** to return to the [Contract](#) Header Enquiry Detail window.

Contract Conditions Pop-up

To display this pop-up, select **Conditions Enq (F18)** on the [Contract](#) Header Enquiry Detail window or select Conditions on the [Contract](#) Equipment Enquiry Detail window.

Fields

Cover Type

This field displays the [cover type](#) for the header.

Eff. Date

This field displays the effective date of this [contract](#) condition. [Contract](#) billing will use the charges effective at the beginning of the [invoice period](#).

Currency Code

This defaults from the customer additional service details for the [site](#), or the account on the [contract](#) header.

Fixed Service Charge

This field displays the value you want to charge either for the [term](#) of the [contract](#) or for a month, depending on how you have set the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window. Once you have decided on either month or [term](#) processing, you cannot change it.

Charges entered at header level will be applied to all machine lines, unless a special machine line condition is set up.

Fixed Rental Charge

This field displays the rental you want to charge.

The software will charge this value for the [term](#) of the [contract](#), or for a month, depending on how you set up the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window. Once you have decided on either month or [term](#) processing, you cannot change it.

The charge entered at header level will be applied to all machine lines, unless a special machine line condition is set up.

Pre-Billing Value/Volume

This field is only displayed if the Pre-billing field is **checked** in the [Contract Type](#) file.

The [contract type](#) determines whether this is a monetary value or a number of copies or vends.

This field displays the monthly minimum value for copies or vends.

You can only use this field if the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window is set to **Month**. Once you have decided on either month or [term](#) processing, you cannot change it.

The header level charge is applied to all machines on the [contract](#) and cannot be changed on the conditions for individual machine lines.

Minimum Volume

This field is only displayed if the Minimum Volume field is **checked** in the [Contract Type](#) file.

This field displays the agreed minimum number of copies or vends which will be invoiced each month.

You can only use this field if the Processing by Month or [Term](#) field on the [Company](#) Profile Maintenance Response window is set to **Month**. Once you have decided on either month or [term](#) processing, you cannot change it.

The minimum, entered at header level, is applied to all machine lines unless you change it in the [Contract Conditions](#) pop-up on a machine line.

Copies in Rental

This field is only displayed if the Copies in Rental field is **checked** in the [Contract Type](#) file.

This field displays number of copies per month which are to be included in the rental charge.

Free Copies

This field is only displayed if the Free Copies field is **checked** in the [Contract Type](#) file.

This field displays the number of free copies allowed on each monthly billing.

Meter 1 - Band Volume To

This field displays maximum number of copies to which the price for the band applies.

The volume for band 1 must not be less than the minimum volume.

Meter 1 - Band Price per Copy

This field displays the price per copy to be charged up to the band maximum.

You can express the copy price in pence (or cents) by setting the Copy Price Conversion Factor field on the [Company](#) Profile Maintenance Meterage window.

Meter 2 - Band Volume To

This field is only displayed if the Meter 2 Copies field is **checked** in the [Contract Type](#) file.

This field displays the maximum number of copies to which the price for the band applies.

Meter 2 - Band Price per Copy

This field is only displayed if the Meter 2 Copies field is **checked** in the [Contract Type](#) file.

This field displays the price per copy to be charged up to the band maximum.

You can express the copy price in pence (or cents) by setting the Copy Price Conversion Factor field on the [Company](#) Profile Maintenance Meterage window.

If meterage is specified, at least one price band must be entered for meter 2 even if it is not used in the [contract](#).

Note: Only the [contract conditions](#) selected for the [contract type](#) will be displayed.

Select **Previous (F12)** to return to the [Contract](#) Header Enquiry Detail window.

Contract Billing History Window

To display this window, select **Invoice Enquiry (F23)** on the [Contract](#) Header Enquiry Detail window.

This window displays the total revenue for the [contract](#), and lists all invoices.

Functions

Base Currency/Prime Currency (F14)

Use this to toggle between displaying values in base and prime currency.

Select **Previous (F12)** to return to the [Contract](#) Header Enquiry Detail window.

Contract Equipment Enquiry Detail Window

To display this window, select **Detail (F8)** on the [Contract](#) Header Enquiry Detail window.

Fields

Inst.Adr

This field displays the account number.

Loc

This field displays the [site](#), or [installation address](#), of the equipment. This need not be the same address as on the [contract](#) header.

Model

This field displays the [model](#) code for the equipment.

Serial

This field displays the [serial number](#) of the piece of equipment.

Stat

This field displays the status of the equipment on the [contract](#) as follows:

Pen - Pending

Act - Active

Exp - Expired

Del - Deleted

Quo - [Quotation](#)

Inc Dt

This field displays the date on which the equipment was/will be included on the [contract](#).

This date must lie between the [contract](#) start date and end date.

Remov Dt

This field displays the date on which the equipment was/will be removed from the [contract](#).

R Hrs

This field displays the [contracted](#) response time for the piece of equipment.

If a time is displayed, it will override the response time on the [contract](#) header.

Vst

One of the following is displayed:

0 - If no [visits](#) have been generated

1 - If scheduled [visits](#) exist

Options

Conditions

Use this to see the [Contract Conditions](#) pop-up.

Peripherals

Use this to access the Peripheral Conditions window where you can see peripheral charges on the [contract](#) equipment.

Inv Hist.

Use this to see the invoice history on the [Contract](#) Billing History window.

Meter Hist.

Use this to see any meter history on the Meter Reading History window.

Stats.

Use this to see meter reading statistics.

Visits

Use this to see the scheduled [visits](#).

Functions

Fold/Truncate (F13)

Use this to toggle between displaying more details or summary details only for each equipment line.

Text (F21)

Use this to display any text associated with the equipment.

Select **Exit (F3)** to leave the enquiry.

Enquire on Contract Type [12/EQC]

Use this [task](#) to enquire on the details of [service contract types](#).

Contract Type Enquiry Selection Window

To display this window, select the Enquire on [Contract Type task](#).

Fields

Contract Type

Enter a valid [contract type](#).

Alternatively, use the prompt facility to select from the [Contract Type Selection](#) pop-up.

Select a [contract type](#) or enter a [contract](#) and then press Enter to display the [Contract Type Enquiry Detail](#) window.

Contract Type Enquiry Detail Window

To display this window, select a [contract type](#) or enter a [contract type](#) and then press Enter on the [Contract Type Enquiry Selection](#) window.

Fields

Automatically Generate Service Schedule

This field is for future development.

Quotation Required on Renewal

This field is **checked** if this type of [contract](#) is renewed as a [quotation](#).

Use Contract Start Date Rates

This field is left **unchecked** if the labour rates and parts prices used in [job](#) pricing, for any [jobs](#) on equipment covered by this [contract](#), are those effective on the date of [call](#) out, or the date of the engineer's [visit](#).

This field is **checked** if the labour rates and parts prices used in [job](#) pricing, for any [jobs](#) on equipment covered by this [contract](#), are those effective at the [contract](#) start date.

Response Hours Guarantee

This field displays the normal response time guaranteed for equipment covered by this type of [contract](#).

This is used in [job](#) escalation routines.

Contract Duration (Months)

This field displays the standard [contract](#) duration, used to calculate [contract termination](#).

If the duration is 0, it indicates a [contract](#) which runs indefinitely.

Termination Notice in Days

The number of days displayed is used by the [contract](#) credit program as the default number of penalty days for [contract](#) cancellation.

For example, if 0 is displayed here, if a customer wants to cancel a [contract](#) they have to give 10 days notice. This means that calculations for how much to credit the customer for unused [contract](#) cover (assuming the customer has paid in advance), will deduct 10 days' credit.

Invoice Schedule

One of the following is displayed:

Advance - For [contract types](#) invoiced in advance

[Visit](#) - For [contract types](#) invoiced after each scheduled [visit](#)

Arrears - For [contract types](#) invoiced in arrears

The invoice cannot be printed until after the end of any instalment period.

Calendar Code

If this [contract type](#) is attached to a calendar, that calendar is displayed here.

Contract Type Parameters

Fixed Service Charge

This field is **checked** if you can apply fixed service charges to this [contract type](#).

The fields for these charges are displayed on the [Contract Conditions](#) pop-up.

Interim Charges

This field is **checked** if you can apply interim charges to this [contract type](#), and the input fields for these charge cycles will be displayed on the [Contract](#) Billing pop-up.

Interim charges allow for actual or estimated copies, in excess of the minimum, to be invoiced periodically.

Fixed Rental Charge

This field is **checked** if you can apply fixed rental charges to this [contract type](#).

The fields for these charges are displayed on the [Contract Conditions](#) pop-up.

Reconciliation Charges

This field is **checked** if you can apply reconciliation charges to the [contract type](#).

The fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Reconciliation charges allow for actual copies in excess of the minimum to be invoiced, or excess estimated copies which have been invoiced, to be credited at the end of the month.

Minimum Volume

This field is **checked** if you can apply minimum copy volumes to this [contract type](#).

The fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Unit Charges 1

This field is **checked** if you can apply copy charge bands to this [contract type](#).

The fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Pre-billing Value

This field is **checked** if you can apply a pre-determined value to this [contract type](#).

The fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Unit Charges 2

This field is **checked** if you can apply copy charge bands to this [contract type](#).

The fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Pre-Billing Volume

This field is **checked** if you can apply a pre-determined volume to this [contract type](#).

The fields for these charge cycles are displayed on the [Contract Conditions](#) pop-up.

Free Units

This field is **checked** if the number of free copies specified on the [Contract Conditions](#) pop-up will be allowed on each monthly billing.

Warranty Units

This field is **checked** if warranty units are applicable.

The system will suggest that the [job category](#) be changed from Warranty to Breakdown if the warranty unit calculation on the [contract](#) is exceeded.

Free Visits

This field is for future development.

Select **Exit (F3)** to leave the enquiry.

Enquire on Scheduled Visit Profile [13/EQC]

Use the enquiry [task](#) to enquire on existing profiles.

Scheduled Visit Profile Enquiry Selection Window

To display this window, select the Enquire on [Scheduled Visit Profile task](#).

Fields

Enter Profile to Enquire On

Enter a [scheduled visit profile](#).

Alternatively, use the prompt facility to select from the [Scheduled Visit Profile](#) Enquiry pop-up.

A [visit](#) profile is a recommended pattern of planned maintenance [visits](#) which can be applied at [contract](#), [model](#), [model](#) group, or [company](#) level. The profile indicates both the [service periods](#) and [job](#) categories of the intended [visits](#).

Select a profile or enter a profile and then press Enter to display the [Scheduled Visit Profile](#) Enquiry Detail window.

Scheduled Visit Profile Enquiry Detail Window

To display this window, select a profile or enter a profile and then press Enter on the [Scheduled Visit Profile](#) Enquiry Selection window.

Fields

Rel Prd.

The relative period is the number of [service periods](#), after the period in which a [contract](#) starts, in which a scheduled service [visit](#) will be generated. The relative period 0 would indicate a [visit](#) in the period in which the [contract](#) started.

Job/Category

These fields display the [job category](#) and its description.

The [job category](#) indicates the type of [job](#) which the engineer is going to do on the scheduled [visit](#).

Note: If *RP is displayed in the [Job](#) field, the software will generate a repeat cycle of [visits](#), using the [scheduled visit profile](#), starting from the relative period displayed in the [Rel Prd.](#) field.

Est. Hours

This field displays an estimate of how long this type of [job](#) normally takes.

Service Units

For Time and Units profiles, a value will be displayed, denoting the number of units' usage that will be allowed prior to the planned [visit](#).

For example, for a car, the next service could be due after 12 months or 9000 miles.

Proc.

This procedure field can be used to differentiate further which of the planned [visit job](#) templates will be picked up when the Load Planned Maintenance [Jobs task](#) is run.

Procedures are set up under type PROC in the Equipment Servicing Codes/Parameters file.

Select **Exit (F3)** to leave the enquiry.

Enquire on Recommended Service Visits [14/EQC]

Use this [task](#) to enquire on the details of recommended [visits](#) per [model](#) group.

Recommended Visits Enquiry Selection Window

To display this window, select the Enquire on Recommended Service [Visits task](#).

Fields**Division**

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter an existing [model](#) group for the selected [division](#).

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Each [model](#) group can have a [scheduled visit profile](#) attached, with an effective date. The software will use this to generate scheduled service [visits](#), if there is no [visit](#) profile specified at [contract](#) or [model](#) level.

Enter or select a [division](#) and [model](#) group and then press Enter to display the Recommended Service [Visits](#) Enquiry Detail window.

Recommended Visits Enquiry Detail Window

To display this window, enter or select a [division](#) and [model](#) group and then press Enter on the Recommended [Visits](#) Enquiry Selection window.

Fields

Date

This field displays the date on which a [model](#) group and a [scheduled visit profile](#) association become active.

Visit/Profile Code

The [scheduled visit profile](#) is used with the correct effective date to generate scheduled service [visits](#), if there is no [scheduled visit profile](#) specified at [contract](#) or [model](#) level.

Select **Exit (F3)** to leave the enquiry.

Enquire on Contract Rates [15/EQC]

Use this [task](#) to enquire on the details of [contract](#) rates for a [model](#) group and [term](#), by currency.

Contract Rates Enquiry Selection Window

To display this window, select the Enquire on [Contract](#) Rates [task](#).

Fields

Division

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

Each [model](#) group can have [contract](#) rates attached, with effective dates. The software will use the current rate when pricing the [contract](#), to price a piece of equipment belonging to a particular [model](#) group.

Billing Term

Enter a value from 1 to 120 calendar months. The default value is 12.

The [term](#) defines the price protection period for the [contract](#) and the number of periods for which [contract](#) pricing will generate pending invoice and actual invoice records.

The [contract](#) rate selected for the [contract](#) header will be for the same [term](#) as that entered in the [contract](#) billing parameters.

Currency Code

Enter a valid currency.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Press Enter to display the [Contract](#) Rates Enquiry Detail window.

Contract Rates Enquiry Detail Window

To display this window, press Enter on the [Contract](#) Rates Enquiry Selection window.

Fields**MG**

The [contract](#) rate will apply to this [model](#) group within the product [division](#).

MSG

If a [model](#) sub-group is displayed, the [contract](#) rate will only apply to [models](#) which belong to this [model](#) sub-group within the [model](#) group.

Any [contract](#) rates for the [model](#) group will be overridden by the rates for the [model](#) sub-group.

Model

If a [model](#) number is displayed, these rates will override those for the [model](#) group or [model](#) sub-group in [contract](#) pricing.

Typ

This field displays the [contract type](#). This indicates the [contract](#) rate to be used in [contract](#) pricing depending on the [contract type](#) of the [contract](#) being priced.

Eff. Date

This field displays the date on which the [contract](#) rates become active. All [contract](#) rates with earlier dates will be obsolete.

Rental

This field displays the annual rental, which is used in [contract](#) pricing. It is applied per [contract term](#).

Service

This field displays the annual service charge. This value, also known as the fixed service charge, is used in [contract](#) pricing and is applied per [contract term](#).

Select **Exit (F3)** to leave the enquiry.

Enquire on Cover Type [16/EQC]

Use this [task](#) to enquire on existing [cover types](#).

Cover Type Enquiry Selection Window

To display this window, select the Enquire on [Cover Type task](#).

Fields

Cover Type

Enter a [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type Selection Window](#) pop-up.

Select a [cover type](#) or enter a [cover type](#) and then press Enter to display the [Cover Type Enquiry window](#).

Cover Type Enquiry Window

To display this window, select a [cover type](#) or enter a [cover type](#) and then press Enter on the [Cover Type Enquiry Selection window](#).

Fields

Description (Untitled)

This field displays the description for the selected [cover type](#).

Service Visit Profile

This field displays the [scheduled visit profile](#) attached to the [cover type](#), along with the description.

Select **Exit (F3)** to leave the enquiry.

Enquire on Technician [21/EQM]

Use this enquiry to display the details of a specified technician.

Technician Enquiry Selection Window

To display this window, select the Enquire on Technician [task](#).

Use this window to select the technician for whom you want to display the details.

Fields

Technician

Enter a technician.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Select a technician or enter a technician and then press Enter to display the Technician Enquiry Address window.

Technician Enquiry Address Window

To display this window, select a technician or enter a technician and then press Enter on the Technician Enquiry Selection window.

This window displays for the selected technician:

Functions

Additional Details (F10)

Use this to display the remote communications parameters. These parameters are only used if Remote Communications is installed.

Skills Matrix (F14)

Use this to display the skills matrix for the selected technician.

Alternative Technician (F16)

Use this to display any alternative technicians defined for this technician. This is only displayed if you have set the Assign by Territory or Alternative Technician field to **Alternative Technician** on the [Company](#) Profile Maintenance General window.

Press Enter to view the Technician Enquiry Detail Window.

Technician Enquiry Detail Window

To display this window, press Enter on the Technician Enquiry Address window.

This window displays for the selected technician:

Functions

Additional Details (F10)

Use this to display the remote communications parameters. These parameters are only used if Remote Communications is installed.

Skills Matrix (F14)

Use this to display the skills matrix for the selected technician.

Alternative Technician Enq. (F16)

Use this to display any alternative technicians defined for this technician. This is only displayed if you have set the Assign by Territory or Alternative Technician field to **Alternative Technician** on the [Company](#) Profile Maintenance General window.

Select **Exit (F3)** to leave the enquiry.

Technician Enquiry Skills Matrix Window

To display this window, select **Skills Matrix (F14)** on the Technician Enquiry Detail window or the Technician Enquiry Address window.

This window displays the [models](#), [divisions](#), [model](#) group and [model](#) sub-group this technician can maintain. It also displays which type of [job](#) the technician can carry out on each category.

Functions

Fold/Truncate (F13)

Use this to toggle the display between showing just the codes and the full descriptions.

Select **Exit (F3)** to leave the enquiry.

Enquire on Reporting Hierarchy [22/EQM]

Use this enquiry to display the reporting hierarchy.

You define the reporting hierarchy as a tree structure that can be viewed on one of three levels.

Reporting Hierarchy Enquiry Selection Window

To display this window, select the Enquire on Reporting Hierarchy [task](#).

Use this window to select the reporting hierarchy for which you want to display the details.

Fields

Main Area/Sub Area/Problem

Enter the levels at which you wish to enquire.

You can use the prompt facility on these fields to select from the appropriate pop-up.

Enter or select the required level and then press Enter to display the Reporting Hierarchy Enquiry Detail pop-up.

Reporting Hierarchy Enquiry Detail Pop-up

To display this pop-up, enter or select the level required and then press Enter on the Reporting Hierarchy Enquiry Selection window.

This pop-up shows the lower level codes included within the selected level.

Select **Previous (F12)** to return to the Reporting Hierarchy Enquiry Selection window.

Enquire on Model/Rep. Hierarchy Relationship [23/EQM]

Use this enquiry to display the reporting hierarchy for a selected point in the [model](#) hierarchy.

You define a reporting hierarchy against a point in the [model](#) hierarchy which may be the top-level [division](#) or the lowest level [model](#).

Model/Rep. Hierarchy Enquiry Selection Window

To display this window, select the Enquire on [Model/Rep. Hierarchy Relationship](#) [task](#).

Use this window to select the point in the [model](#) hierarchy for which you want to display the details.

Fields

Division/Model Group/Model Sub-group/Model/Job Category

Enter the point in the hierarchy you require.

You can use the prompt facility on these fields to select from the appropriate pop-up.

Enter or select the hierarchy details and then press Enter to display the [Model/Rep. Hierarchy Relationship Enquiry Detail](#) window.

Model/Rep. Hierarchy Enquiry Detail Window

To display this window, enter or select the hierarchy details and then press Enter on the [Model/Rep. Hierarchy Enquiry Selection](#) window.

This window shows the reporting codes included at the selected hierarchy point.

Select **Exit (F3)** to leave the enquiry.

Enquire on Job Category [24/EQM]

Use this enquiry to display [job category](#) codes and associated data.

Equipment Servicing uses [job category](#) codes to define different types of service work to undertake, for example, in [job](#) maintenance, and scheduled service [visit](#) maintenance.

The technical reporting module also uses [job](#) categories to identify how to [cost](#) or charge the work undertaken.

To access a [job category](#) record for enquiry, select a category code.

Job Category Enquiry Selection Window

To display this window, select the Enquire on [Job Category task](#).

Fields

Job Category

Enter a [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Enter or select a [job category](#) and then press Enter to display the [Job Category](#) Enquiry Financial window.

Job Category Financial Enquiry Window

To display this window, enter or select a [job category](#) and then press Enter on the [Job Category](#) Enquiry Selection window.

Use this window to view the financial information for the selected [job category](#).

Fields

Job Category Description

This field displays the description of the [job category](#).

Close Job after 1st Invoice

One of the following is displayed:

- 0 - If you do not close [jobs](#) automatically after producing the first invoice
- 1 - If you close a [job](#) automatically once you have produced an invoice

You normally use this for consultancy companies, and other time and materials (T&M) businesses, where you only invoice a [job](#) once it is complete.

Note: If this field is set to 0, once you have produced the first invoice, the [job](#) closes and you cannot produce any more invoices at that level.

Income Deferred

One of the following is displayed:

- 0 - If you post income directly to profit and loss accounts within [General Ledger](#)
- 1 - If you defer income from this [job](#) type

Invoicing/Capitalisation

One of the following is displayed:

- 1 - If you raise invoices once all [job](#) details are closed
- 2 - If you raise invoices once this particular [job](#) detail is closed
- 3 - If you raise invoices on demand

Disable Transfer Methods

One of the following is displayed:

- 0 - If you can use this [transfer method](#) for this [job](#) type
- 1 - If you cannot use this [transfer method](#) for this [job](#) type

Transfer Method

For details on how each [transfer method](#) works, refer to the following table.

Transfer Method	Initial Posting	Transfer To	Transfer Process Req'd	Release Process Req'd	Close Process Req'd
0	P&L	n/a	n/a	n/a	n/a
1	WIP	P&L	YES	NO	NO
2	WIP	P&L	YES	YES	NO
3	WIP	P&L	YES	YES	YES
4	WIP	FA	YES	NO	NO
5	WIP	FA	YES	YES	NO
6	WIP	FA	YES	YES	YES
7	WIP	n/a	n/a	n/a	n/a
8	WIP	P&L/FA	YES	n/a	Optional

Key:

[WIP](#): Work in Progress; P&L: Profit and Loss; FA: Fixed Assets

Initial Posting - The place in [General Ledger](#) where you want to post [costs](#) when initially posted to the GL

Transferred To - Where [costs](#) are transferred to when released from [WIP](#)

Transfer Process Required - Whether you need to initiate the transfer via a [task](#) or activities

Release Process Required - Yes means that the transfer process only transfers those [costs](#) defined using the Release [Jobs task](#). No means that the transfer process processes all [costs](#) still in [WIP](#).

Close Process Required - Yes means that you can only run the Release [Jobs task](#) for closed [jobs](#). No means you do not need to close the [job](#) first.

Note: To get [costs](#) with a [transfer method](#) of 7 out of [WIP](#) you must change the [transfer method](#).

India parts tax only

India only

This will be checked if India parts tax only is applicable

Functions

Model Types (F14)

Use this to display the table of [model](#) types that can be used with this [job category](#). In the Maintain [Model task](#) you can define the [model](#) type of a [model](#) number. When creating a [job](#) for a specific [job category](#), you can only add [models](#) to the [job](#) that have a [model](#) type associated with the [job category](#) of the [job](#).

Therefore Equipment [models](#) might be excluded from Service exchange [jobs](#).

If no [model](#) type list is created, all [model](#) types can be used when creating [jobs](#) with this [job category](#).

Expense Types (F19)

Use this to display the table of expenses types that can be used with this [job category](#).

For example, you might decide that Miscellaneous expenses cannot be booked to Workshop [jobs](#) or that the Parts [expense type](#) cannot be booked to a Training [job](#).

Press Enter to display the [Job Category](#) Structure window.

Job Category Structure Window

To display this window, press Enter on the [Job Category](#) Financial Enquiry window.

Use this window to view the [job](#) structure details for the [job category](#).

Fields

Category Type

One of the following is displayed:

- 01 - Field Service Breakdown

- 02 - Field Service Planned Maintenance
- 03 - Field service Warranty [Job](#)
- 04 - Workshop Warranty
- 05 - Workshop Breakdown
- 06 - Service Exchange
- 07 - Workshop Planned Maintenance
- 08 - Workshop Planned Maintenance
- 09 - [Cost Job](#)

At some points in the system, users are able to change the [job category](#).

The following rules apply.

- It is not possible to change a workshop [job category](#) to a field service [job category](#) and vice versa.
- It is not possible to change a [job](#) to/from a Service Exchange [job](#).
- It is not possible to change a [job](#) to a [cost job](#).

Default Category

This field displays the default category, if any, for the [job category](#).

These are required throughout the system when Equipment Servicing needs to retrieve a specific [job category](#). There is only one default [job category](#) for each type.

If this is the default for this [job](#) type, it will show the category, in the range 1 to 9, or A, B or C. If this is not the default it will show 0.

The categories are as follows:

- A - Workshop Breakdown
- B - Workshop Warranty
- C - Warranty Claim
- D - Workshop Repeat
- E - Workshop specialist
- 0 - Not a default
- 1 - Breakdown
- 2 - [Installation](#)
- 3 - Withdrawal
- 4 - Return [Job](#)
- 5 - Repeat [Job](#)
- 6 - Specialist Repeat
- 7 - Return for Knowledge
- 8 - Return for other reasons
- 9 - Warranty (Field)

Category Discipline

This field displays the discipline code associated with the [job category](#).

The discipline is a reporting code that can be used for the [job](#).

The valid disciplines are maintained in the Equipment Servicing Codes/Parameters file under type JDPL.

Job Category Different at Sub-job Level

When a [job](#) structure is being set up, either within [job](#) structure maintenance or [Call Logging/Work Control](#), this is checked to ensure that the user can maintain the [job category](#) at [sub-job](#) level.

One of the following is displayed:

- 0 - If the [job category](#) is prevented from being changed for a specific [sub-job](#) within a [job](#)
- 1 - If the [job category](#) is allowed to be changed for a specific [sub-job](#)

Job Category Different at Task Level

When a [job](#) structure is being set up, either within [job](#) structure maintenance or [Call Logging/Work Control](#), this is checked to ensure that the user can maintain the [job category](#) at [task](#) level.

One of the following is displayed:

- 0 - If the [job category](#) is prevented from being changed for a specific [task](#) within a [job](#)
- 1 - If the [job category](#) can be changed for a specific [task](#)

Technician Different at Sub-job Level

When a technician is assigned to the prime [job](#), this field is checked to see if a different technician can be manually assigned at [sub-job](#) level.

One of the following is displayed:

- 0 - If a different technician cannot be assigned at [sub-job](#) level
- 1 - If a different technician can be assigned at [sub-job](#) level

Technician Different at Task Level

When a technician is assigned to the prime [job](#), this field is checked to see if a different technician can be manually assigned at [task](#) level.

One of the following is displayed:

- 0 - If a different technician cannot assigned at [task](#) level
- 1 - If a different technician can be assigned at [task](#) level

Job Category Normally Chargeable

One of the following is displayed:

- 0 - If the [job category](#) is not normally chargeable
- 1 - If the [job category](#) is normally chargeable

The actual chargeability of the [job](#) is decided by the [job category/cover type](#) charge matrix. For further information, see the Maintain [Cover Type/Job Category](#) section in the Equipment Servicing Operations Maintenance chapter of this product guide.

Parts Fault Reporting Mandatory

This field is used in windows where parts are reported on a [job](#). This forces the user to enter codes against the [job](#) if parts have been booked.

One of the following is displayed:

- 0 - If [job](#) completion is allowed without reporting codes
- 1 - If reporting code entry is mandatory at [job](#) completion

Model Different at Sub-job Level

This field is checked to see if a different [model](#) can be manually assigned at [sub-job](#) level.

One of the following is displayed:

- 0 - If you cannot assign a different [model](#) at [sub-job](#) level
- 1 - If you can assign a different [model](#) at [sub-job](#) level

Model Different at Task Level

This field is checked to see if a different [model](#) can be manually assigned at [task](#) level.

One of the following is displayed:

- 0 - If you cannot assign a different [model](#) at [task](#) level
- 1 - If you can assign a different [model](#) at [task](#) level

Include Category in Repeat Call Calculation

One of the following is displayed:

- 0 - If the category is excluded from the repeat [call](#) calculation
- 1 - If the category is included in the repeat [call](#) calculation

When you log a [call](#), Equipment Servicing checks repeat [calls](#). They depend on the number of days, or the units used since the last reported service [call](#) to the equipment. You define the days and units between [calls](#) on the volume segment, linked directly to a specific [model](#).

Include Category in Automatic Call Assignment

One of the following is displayed:

- 0 - If [calls](#) of this [job category](#) are excluded from the automatic [call](#) assignment (ACA) of technicians to [calls](#)
- 1 - If [calls](#) of this [job category](#) are included in the ACA of technicians to [calls](#)

Note: [Company](#) profile settings, as well as settings for the [model](#) and technician, also limit ACA operation.

Note: Equipment Servicing version 2.3 does not support the use of ACA.

Average Hours Factor

This field is for future development.

Functions

Model Types (F14)

Use this to display the table of [model](#) types that can be used with this [job category](#). In the Maintain [Model task](#) you can define the [model](#) type of a [model](#) number. When you are creating a [job](#) for a specific [job category](#), you can only add [models](#) to the [job](#) if they have a [model](#) type associated with the [job category](#) of the [job](#).

For example, Equipment [models](#) might be excluded from Service Exchange [jobs](#).

If no [model](#) type list is created, all [model](#) types can be used when creating [jobs](#) with this [job category](#).

Expense Types (F19)

Use this to display the table of expenses types that can be used with this [job category](#).

For example, you might decide that the Miscellaneous [expense type](#) cannot be booked to Workshop [jobs](#) or that the Parts [expense type](#) cannot be booked to a Training [job](#).

Press Enter to display the [Job Category](#) Transaction Enquiry window.

Job Category Transaction Enquiry Window

To display this window, press Enter on the [Job Category](#) Structure Enquiry window.

Use this window to view the [job](#) transaction details for the [job category](#).

Fields

Equipment on Header

This field is used by the programs that roll up [cost](#) values to an appropriate level in the [job](#) to prevent the final roll up to the prime [job](#) record.

This is used for [job](#) categories where the [model](#) on the original [job](#) is not real and should not have [costs](#) associated with it.

The field can only be set to **0** if the [job category](#) has the ability to have different [models](#) at [sub-job](#) and has its own default [model](#) number.

One of the following is displayed:

- 0 - If roll up to the prime [job](#) is prevented
- 1 - If [costs](#) are rolled up to the prime [job](#)

Customer Order Number Mandatory

One of the following is displayed:

- 0 - If a customer order number is not mandatory for this [job category](#) but may be mandatory for a specific customer
- 1 - If a customer order number is mandatory at [call](#) logging

Default Model Number

The [model](#) displayed here is used in [call](#) logging as the default [model](#) for this specific [job category](#).

Meter Readings to be Requested

One of the following is displayed:

- 0 - If meter readings are not to be requested
- 1 - If meter readings are required before [job](#) completion

Hours Reporting Allowed

One of the following is displayed:

- 0 - If [timesheets](#) cannot be entered for the [job](#)
- 1 - If [timesheets](#) can be entered for the [job](#)

Parts Reporting Allowed

One of the following is displayed:

- 0 - If parts cannot be entered for the [job](#)
- 1 - If parts can be entered for the [job](#)

Direct Transaction Expenses Allowed

One of the following is displayed:

- 0 - If direct transactions cannot be entered for the [job](#)
- 1 - If direct transactions can be entered for the [job](#)

Distance/Travel Reporting Allowed

One of the following is displayed:

- 0 - If distance/travel cannot be entered for the [job](#)
- 1 - If distance/travel can be entered for the [job](#)

Stage Payments Allowed

One of the following is displayed:

- 0 - If [stage payments](#) are not allowed
- 1 - If [stage payments](#) can be entered for the [job](#)

Failure Codes Mandatory at Call Reporting

One of the following is displayed:

- 0 - If failure codes are not mandatory for the [job](#)
- 1 - If failure codes must be entered on the [job](#)

Invoicing Allowed if PO Order Not Received

One of the following is displayed:

- 0 - If purchase orders must be received before the [job](#) can be closed
- 1 - If the [job](#) can be closed when the purchase order is still outstanding

Immediate Release of Parts & Order Creation

One of the following is displayed:

- 0 - If parts orders are created manually
- 1 - If parts orders are created automatically as the [job](#) is created

Immediate Generation of Pick Required

This field is set to 1 if process.connect is used to produce pick notes automatically as orders are created.

Quotation Required

This is used within [call](#) logging to force an entry into the [Quotation](#) field.

One of the following is displayed:

- 0 - If [quotations](#) are not mandatory for this [job category](#)
- 1 - If [quotations](#) are mandatory for this [job category](#)

Use Customer Stockroom at Order Creation

This field indicates whether the customer stockroom is used to create the sales order or whether the parts order is for the technician or [branch](#) stockroom.

One of the following is displayed:

- 0 - If the system-generated stockroom is used for the parts sales order
- 1 - If the customer stockroom is used to create the sales order

Functions

Model Types (F14)

Use this to display the table of [model](#) types that can be used with this [job category](#). In the Maintain [Model task](#), you can define the [model](#) type of a [model](#) number. When you are creating a [job](#) for a specific [job category](#), you can only add [models](#) to the [job](#) if they have a [model](#) type associated with the [job category](#) of the [job](#).

For example, Equipment [models](#) might be excluded from Service Exchange [jobs](#).

If no [model](#) type list is created, all [model](#) types can be used when creating [jobs](#) with this [job category](#).

Expense Types (F19)

Use this to display the table of expenses types that can be used with this [job category](#).

For example, you might decide that Miscellaneous expenses cannot be booked to Workshop [jobs](#) or that the Parts [expense type](#) cannot be booked to a Training [job](#).

Press Enter to display the [Job Category](#) Invoice Enquiry window.

Job Category Invoice Enquiry Window

To display this window, press Enter on the [Job Category](#) Transaction Enquiry window.

Use this window to view the invoice detail for the selected [job category](#).

Fields

Credit Assessment Required

This field is used by the two manual [call](#) logging programs to enforce the entry of a request code for Credit Assessment.

One of the following is displayed:

- 0 - If credit assessment is not required on the [job](#)
- 1 - If credit assessment is required on the [job](#)

Pending Invoice Review for Invoices

This field is checked by all the programs that generate pending invoice records.

If this field is set to **1**, pending invoice review is required and the available date on the Pending file will be set to 9999999. This will mean that the transaction will not be available for invoicing unless the user goes through Pending Invoice Maintenance.

If this field is set to **0**, as the invoice pending transaction is written the available date is set to the current date and will be available for invoicing.

One of the following is displayed:

- 0 - If the [job category](#) is to be forced through pending invoice maintenance for release to invoicing
- 1 - If the transaction is to be automatically available for invoicing without the need for pending invoice maintenance

Formal Job Closure Required

This field is checked by the batch [Job](#) Completion [task](#) to see if the [job category](#) can be completed automatically.

If the [job](#) cannot be completed via the batch [task](#), interactive [job](#) completion is required before the transactions can be invoiced.

One of the following is displayed:

- 0 - If the [job](#) can be closed by use of batch [job](#) completion
- 1 - If interactive [job](#) completion is required for the [job](#)

Labour Cost List Override

This is used as an override [cost](#) list for the labour and travel time.

Actual Costs Posted during the Quotation Phase

This field is checked within the [timesheet](#) system. If a [job](#) is still in the [quotation](#) stage, it is possible for a technician to book time to it and these [cost](#) transactions will be posted through the system.

One of the following is displayed:

- 0 - If transactions cannot be booked prior to the quote being converted to a [job](#)
- 1 - If transactions can be booked during the [quotation](#) phase

Actual Costs to Print on Quotation/Invoice

If the [quotation](#) says that five of a part are to be used and charged for, but when the [job](#) is performed only one of the part is used, there is a discrepancy.

It would be considered normal to not want to allow the recipient of the invoice to see that only one part has been used but that you are charging for five.

This field indicates whether, for a specific [job category](#), the actual [costs](#)/transactions are printed in addition to the quoted [costs](#)/charges.

One of the following is displayed:

- 0 - If only the transactions from the [quotation](#) will print on the invoice
- 1 - If transactions from the [quotation](#) and the [job](#) will print on the invoice

Invoice Print Detail (0) Summary (1) or Partial (2)

This field is used by the invoice print program to control the level of detail printed on [job](#) invoices.

The invoice re-print [task](#) allows the user to change this setting and therefore print a copy invoice that looks strikingly different from the original.

One of the following is displayed:

- 0 - Detail print
- 1 - Summary print
- 2 - Partial print

Print Zero Priced Invoice Lines

This is used by the invoice print program to suppress printing of any zero-priced invoice lines.

One of the following is displayed:

- 0 - If zero-priced lines are not printed
- 1 - If zero-priced lines are printed

Labour Utilisation Code

This is an analysis flag that is written to labour [timesheet](#) transactions.

Job Automatically Created from Template

One of the following is displayed:

- 0 - If the user is prompted to select a template from a list of all templates that could be used for the [job](#)
- 1 - If a template is automatically selected and used to create a [job](#)

Cost to Complete

This field is used by the [AFI](#) interface to determine the way in which GL postings are made.

Parts Billed at Booking (1) or Job Close (2)

One of the following is displayed:

1 - First time booking

Parts are available for invoicing immediately after they have been confirmed as despatched in [Order Entry](#) or after they have been booked in Equipment Servicing. The transactions appear as available for selection for invoicing in interactive [Job](#) Completion.

2 - [Job](#) Close

Parts are not shown as available for invoicing in [Job](#) Completion until all [sub-jobs](#) and [tasks](#) within the prime [jobs](#) are at status 50. This may slow down invoice production and cash flow.

Parts Intrastat Reporting Required

One of the following is displayed:

0 - If Intrastat records are not required for parts movements

1 - If Intrastat records are required for parts movements crossing borders

Note: The [World Trade](#) movements are created using the Equipment Servicing Disposal Movements [task](#).

On Demand Commitments

One of the following is displayed:

- 0 - If the commitment [costs](#) will be posted by the batch run of the commitment program
- 1 - If the commitment [costs](#) will be updated using the Update Commitments [task](#)

Allow Single (0) or Multiple (1) Job Entry

One of the following is displayed:

0 - Single entry

Users are returned to the [Job](#) Creation window as a [job](#) is created ready for entry of a new [job](#).

1 - Multiple entry

Users are returned to the [Job](#) Selection window after a [job](#) is created.

Functions

Model Types (F14)

Use this to display the table of [model](#) types that can be used with this [job category](#). In the Maintain [Model task](#), you can define the [model](#) type of a [model](#) number. When you are creating

a [job](#) for a specific [job category](#), you can only add [models](#) to the [job](#) if they have a [model](#) type associated with the [job category](#) of the [job](#).

For example, Equipment [models](#) might be excluded from Service Exchange [jobs](#).

If no [model](#) type list is created, all [model](#) types can be used when creating [jobs](#) with this [job category](#).

Expense Types (F19)

Use this to display the table of expenses types that can be used with this [job category](#).

For example, you might decide that Miscellaneous expenses cannot be booked to Workshop [jobs](#) or that the Parts [expense type](#) cannot be booked to a Training [job](#).

Select **Exit (F3)** to leave the enquiry.

Enquire on Cover Type/Job Category [25/EQM]

Use this enquiry to display the [job](#) categories allowed for a [cover type](#) within a currency. It also displays the invoicing rules relating to each combination.

Note: *Equipment Servicing uses the combination of [cover type](#) and [job category](#), when pricing completed [jobs](#), to determine whether to invoice for hours or parts or miscellaneous charges.*

Cover Type/Job Category Enquiry Selection Window

To display this window, select the Enquire on [Cover Type/Job Category task](#).

Use this window to select the [cover type](#) for which you want to display the details.

Fields

Cover Type

Enter a [cover type](#).

Alternatively, use the prompt facility to select from the [Cover Type](#) Selection Window pop-up.

Currency Code

Enter a currency code.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Enter or select a [cover type](#) and currency code and then press Enter to display the [Cover Type/Job Category](#) Enquiry window.

Cover Type/Job Category Enquiry Window

To display this window, enter or select a [cover type](#) and currency and then press Enter on the [Cover Type/Job Category Enquiry Selection](#) window.

This window indicates which elements are chargeable for each [job](#) on the [cover type](#).

Options

Select

Use this to select a [job category](#) to display the details in the Invoice group box. You can then use the **Charging Overrides (F16)** function.

Functions

Pos. Cur. Charging Overrides (F14)

This function is not available in this enquiry.

Charging Overrides (F16)

Use this to display the Charging Override Enquiry pop-ups for labour, travel, major, minor, consumables and supplies, one after the other, for the highlighted [job category](#). Select **Previous (F12)** on each pop-up to move to the next one.

Select **Exit (F3)** to leave the enquiry.

Charging Overrides Enquiry Pop-up

To display this pop-up, select a [job category](#) line and then select **Charging Overrides (F14)** on the [Cover Type/Job Category Enquiry](#) window.

This pop-up displays the charging override details for the selected charge. These details include minimum and maximum charges for the specified number of hours, effective dates, and the parts excluded and included in this override.

Note: *The information displayed varies depending upon the charge selected.*

On the Labour Overrides pop-up, any fixed charge labour hours will be displayed. These hours are used in [job](#) pricing for chargeable [jobs](#).

For example, if the pop-up shows 2 hours at 50, if a [timesheet](#) entry for this [cover type/job category](#) were to be entered for 5 hours, the system would charge 100 for the first 2 hours and then charge for the remaining 3 hours using the labour price lists.

On the Travel Overrides pop-up, any fixed charge travel hours will be displayed. These hours are used in [job](#) pricing for chargeable [jobs](#).

For example, if this pop-up shows 2 hours at 50, if a travel [timesheet](#) entry for this [cover type/job category](#) were to be entered for 5 hours, the system would charge 100 for the first 2 hours and then charge for the remaining 3 hours using the labour price lists.

On the Parts Overrides pop-up, any parts will be listed, with text in the header to indicate if the table of parts is to be included (as chargeable) or excluded (as non chargeable). This list of parts will then be used in [job](#) pricing for chargeable [jobs](#).

Select **Previous (F12)** on each pop-up to the next one. After the last one, you will be returned to the [Cover Type/Job Category](#) Enquiry window.

Enquire on Job Template [26/EQM]

Job Template Enquiry Selection Window

To display this window, select the Enquire on [Job](#) Template [task](#).

Use this window to enter or select the template you want to create or maintain.

Fields

Template Type

Enter a template type.

Alternatively, use the prompt facility to select from the Template Type pop-up.

This code is stored in the Equipment Servicing Codes/Parameters file under type TEMT. It allows users to store different types of templates. The suggestion is that any templates that are sent out from a central [location](#) should be classed as global templates and any that are maintained/changed locally should be classed as local templates.

The template type is one of the classifications that allows the user to select which template is to be attached to the [job](#).

Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

It is likely that the template required may be totally different on a planned maintenance [job](#) for a machine from one, for example, on a breakdown and therefore the [job category](#) is mandatory.

Division Code

Enter a valid [division](#).

Alternatively, use the prompt facility to select from the [Division](#) Selection pop-up.

This is the first of the fields that categorise the template for the [job category](#) to the [division](#) to which the [models](#) belong.

Model Group

Enter a valid [model](#) group.

Alternatively, use the prompt facility to select from the [Model](#) Group Selection pop-up.

This is the second of the fields that categorise the template for the [job category](#) to the [division](#) and [model](#) group to which the [models](#) belong. If a [model](#) group is entered, a valid [division](#) must also be entered.

Model Subgroup

Enter a valid [model](#) sub-group.

Alternatively, use the prompt facility to select from the [Model](#) Subgroup Selection pop-up.

This is the third of the fields that categorise the template for the [job category](#) to the [division](#), [model](#) group and [model](#) sub-group to which the [models](#) belong. If a [model](#) sub-group is entered, a [division](#) and [model](#) group must also be entered.

Model Number

Enter a valid [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

As the [Model](#) file holds the [division](#), [model](#) group and [model](#) sub-group, if the [model](#) is entered the [division](#), [model](#) group and [model](#) sub-group need not be.

Procedure

Enter a procedure code.

Alternatively, use the prompt facility to select from the Procedure pop-up.

The procedures are held in the Equipment Servicing Codes/Parameters file under major type PROC. They are used to sub-divide further the type of template.

For example, a car may have various planned maintenance [jobs](#) with different parts, etc. required for each one.

The templates may be set up as PSV (Planned Service [Visits](#)) for a specific [model](#), e.g. Fiat Multipla.

However, the procedures may be as follows:

12M

24M

36M

Each of these describes the different service requirements after 12 months, 24 months and 36 months of driving.

Effective Date

Enter or select a valid date on which the template becomes effective.

Enter your criteria and then press Enter to display the [Job](#) Template Enquiry List window.

Job Template Enquiry List Window

To display this window, enter your criteria and then press Enter on the [Job](#) Template Enquiry Selection window.

This window will list any templates that exist for the parameters entered on the [Job](#) Template Enquiry Selection window.

Options

Select

Use this to view the template details on the [Job](#) Template Enquiry Detail window.

Select a template to display the [Job](#) Template Enquiry Detail window or select **Previous (F12)** to return to the previous window.

Job Template Enquiry Detail Window

To display this window, select a [job](#) template on the [Job](#) Template Enquiry Selection window.

Options

View Details

Use this to view the [sub-job](#) or [task](#) on the line selected.

Parts

Use this to view a table of parts normally used for this kind of [task](#) on this category of [job](#).

Expenses

Use this to view a table of expected expenses that might be incurred on this category of [job](#).

Functions

Template Text (F14)

Use this to view template text associated with the template. Any text entered here will be created as [job](#) story text when a [job](#) is created from this template.

Select **Previous (F12)** to return to the previous window.

View Details Pop-up

To display this pop-up, select View Details against a line on the [Job](#) Template Enquiry Detail window.

Use this window to view either a [sub-job](#) or a [task](#).

Fields

Sub-job

This field displays the [sub-job](#) code.

Note: The code will determine the position of the [sub-job](#) in the [job](#) structure. AAA will be before BBB even if it was entered after it.

Description

This field displays the description of the [sub-job](#).

Job Category/Description

This field displays the [job category](#). The [job category](#) template determines whether the [job category](#) at lower levels can be different from the [job category](#) of the template.

If the [job category](#) can be different, this would allow other [tasks](#) such as re-[installation](#) or education to be added to a breakdown template.

The [job category](#) will determine the chargeability of this [sub-job](#) and the team assigned to do the work.

See the Maintain [Job Category](#) section in the Equipment Servicing Operations Maintenance chapter of this product guide for an explanation of the importance of the [job category](#) and its control flags.

Effective From Date

This field displays the effective start date of this template line in the template structure. When a [job](#) is created, only template [sub-jobs](#) with an effective date greater than or equal to the [job](#) creation date will be included in the [job](#) structure.

Allow Actuals if Quote

If this field is **checked**, this [sub-job](#) is to be created as a [job line](#) when the template is used to create a quote. During [call](#) logging, you can request a [quotation](#) to be created and not a [job](#). However, any lines with this field **checked** will be created as [job lines](#). These [tasks](#) are usually to allow scheduling and reporting of the time required to actually produce the [quotation](#).

A flag on the [job category](#) of the template will determine if the time to produce the [quotation](#) will be invoiced to the customer.

Estimated Labour Hours

A value in this field indicates that this [sub-job](#) is to be used for labour. The [sub-job](#) does not need to have any hours, parts or subcontract activities attached to it, it can act only as a control.

Total Labour Hours

This field is calculated by the application and is a total of estimated labour hours of all the [tasks](#) associated with this [sub-job](#) plus the estimated labour hours of the [sub-job](#) itself.

Chargeable

This field will be set to **1** if a single chargeable element is set to **1** on the [cover type/job category](#) charge matrix. Chargeable elements are labour, travel, mileage, expenses and up to 4 categories on Inventory items. See the Maintain [Cover Type/Job Category](#) section in the

Equipment Servicing Operations Maintenance chapter of this product guide for further explanation.

S/C Reference

If a subcontract reference is displayed in this field, it will be used as the item for the creation of a purchase order for this [sub-job](#). This will make this [sub-job](#) or [task](#) a subcontract [sub-job](#) or [task](#) and estimated hours cannot have a value.

Quantity

If a subcontract quantity is displayed in this field, it will be used as the quantity for the creation of a purchase order for this [sub-job](#) or [task](#).

Predecessor Sub-job/Task

This field indicates whether a particular [sub-job](#) or [task](#) is a predecessor [task](#) in the [job](#) structure and should have a target date and time less than the target date and time of the [sub-job/task](#) being viewed.

Elapsed Days

If this field has a value, this will force the target start date and time of the [job line](#) generated from this template line to be this number of elapsed days after the previous [job line](#). This allows delay to be introduced into the timeline of the [job](#). For instance, a 3-day delay could be introduced after subcontract [tasks](#) to compensate for any transport risks.

Model Number

The [model](#) number indicates that this template line is for activities on a different piece of equipment from the equipment on the template. A [model](#) can only be different if the [job category](#) flag that allows the [model](#) to be different is set to 1.

Instruction Code

This field will display a value if there is an instruction code associated with the template line. The instruction code has attached to it a number of work instructions. This allows complex [job](#) instructions to be added to the [job](#) without increasing the number of reportable [tasks](#) to the [job](#).

Select **Previous (F12)** to return to the [Job](#) Template Enquiry Detail window.

Parts Pop-up

To display this pop-up, select Parts against a line on the [Job](#) Template Enquiry Detail window.

Use this pop-up to view parts required on a template line.

Fields

Part Number

This field displays a valid Inventory item number.

Description

This field displays the part description.

Quantity

This field displays the quantity required.

UoM

This field displays the unit of measure that will be used when an order is placed.

Select **Previous (F12)** to return to the [Job](#) Template Enquiry Detail window.

View Expenses Pop-up

To display this pop-up, select Expenses against a line on the [Job](#) Template Enquiry Detail window.

Use this pop-up to view expenses on the template.

Fields**Expense Type/Description**

These fields display any expenses that could be used on this [job](#).

They are for information only in this version of the application.

Select **Previous (F12)** to return to the [Job](#) Template Enquiry Detail window.

Enquire on Defect Code [27/EQM]

You use this enquiry to display the defect and repair relationships. These apply to the parts the technician fits to equipment during a repair. You enter them when you complete a technical report to show the condition of the part removed.

Defect Code Enquiry Selection Window

To display this window, select the Enquire on Defect Code [task](#).

Fields**Defect Code**

Enter a valid defect code.

Alternatively, use the prompt facility to select from the Defect Code pop-up.

Select a defect code or enter a defect code and then press Enter to display the Defect Code Enquiry window.

Defect Code Enquiry Window

To display this window, select a defect code or enter a defect code and then press Enter on the Defect Code Enquiry Selection window.

This window displays the defined repair codes for the specified defect. The information displayed includes the description, the default repair and whether you need to add or replace a part.

For more information on each field, refer to the Maintain Defect Code section in the Equipment Servicing Operations Maintenance chapter of this product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on FSG/Territory/Team [28/EQM]

Use this [task](#) to review the relationship between [field service groups](#), geocodes, territories, teams, technicians and alternative technicians.

The relationships displayed here are the basis for selecting a team or technician when scheduling work in [call](#) logging.

You can define any geocode to more than one territory. This is useful if you have service areas that overlap for different products.

FSG/Territory/Team Enquiry Selection Window

To display this window, select the Enquire on FSG/Territory/Team [task](#).

Fields

Branch

Enter the [branch](#) on which you want to enquire. This field defaults to your current [branch](#).

Territory Profile Code

Enter an existing territory.

Alternatively, use the prompt facility to select from the TRPC Territory Profile Code pop-up.

Press Enter to display the FSG/Territory/Team Enquiry List window.

FSG/Territory/Team Enquiry List Window

To display this window, press Enter on the FSG/Territory/Team Enquiry Selection window.

Options

Select

Use this to display the FSG/Territory/Team Enquiry Details window.

Select a line to display the FSG/Territory/Team Enquiry Details window.

FSG/Territory/Team Enquiry Details Window

To display this window, select a line on the FSG/Territory/Team Enquiry List window.

Fields

Tty

If a code is displayed, this is the territory to which the defined geocodes, teams and technicians apply.

GeoCode Geo1

If a code is displayed, this is the first part of the geocode. This may correspond to the first part of a postcode, for example.

GeoCode Geo2

If a code is displayed, this is the second part of the geocode. This may correspond to the second part of a postcode, for example.

Prime Eng.

If a code is displayed, this is the prime technician. This is the technician that the software will select to service any machine that is part of the specified [field service group](#) and also lies in the specified territory and geocode.

Prime Team

If a code is displayed, this is the prime team. This is the team that the software will select to service any machine that is part of the specified [field service group](#) and also lies in the specified territory and geocode.

First Eng.

If a code is displayed, this is the first alternative technician. This is the technician that the software will select if the prime technician or team is not available.

First Team

If a code is displayed, this is the first alternative team. This is the team that the software will select if the prime technician or team is not available.

Second Eng.

If a code is displayed, this is the second alternative technician. This is the technician that the software will select if the prime and first technicians or teams are not available.

Second Team

If a code is displayed, this is the second alternative team. This is the team that the software will select if the prime and first technicians or teams are not available.

Third Eng.

If a code is displayed, this is the third alternative technician. This is the technician that the software will select if the prime, first and second technicians or teams are not available.

Note: *This may be a catch-all, perhaps a supervisor who would then be assigned any [job](#) that the software could not assign to a specified technician or team.*

Third Team

If a code is displayed, this is the third alternative team. This is the team that the software will select if the prime, first and second technicians or teams are not available.

Note: *This may be a catch-all, perhaps a supervisor who would then be assigned any [job](#) that the software could not assign to a specified technician or team.*

Select **Exit (F3)** to leave the enquiry.

Enquire on Field Service Group [29/EQM]

Use this [task](#) to display [field service group](#) details, which link [divisions](#) and [model](#) families within a group.

You set up a team of technicians by allocating certain combinations of [field service group](#), territory and [job category](#) characteristics.

Field Service Group Enquiry Selection Window

To display this window, select the Enquire on [Field Service Group task](#).

Fields**Field Service Group**

Enter a [field service group](#).

Alternatively, use the prompt facility to select from the Field Service Selection pop-up.

Enter or select a [field service group](#) and then press Enter to display the [Field Service Group](#) Enquiry Detail window.

Field Service Group Enquiry Detail Window

To display this window, enter or select a [field service group](#) and then press Enter on the [Field Service Group](#) Enquiry Selection window.

This window displays a list of [divisions](#), [model](#) groups, [model](#) sub-groups and [models](#) which are defined to the selected [field service group](#).

Functions

Fold/Truncate (F13)

Use this to toggle between displaying more and less detail on the detail lines.

Select **Exit (F3)** to leave the enquiry.

Enquire on 3-D Matrix [30/EQM]

Use this enquiry to display the percentage change to apply to the [call](#) response time depending on the customer priority, the volume usage of the [model](#) and whether or not the machine is working.

3-D Matrix Enquiry Detail Window

To display this window, select the Enquire on 3-D Matrix [task](#).

The 3-D matrix is displayed for each volume segment record set up in the Volume Segment file.

The window shows the percentage reduction to apply to the [call](#) response time for up to four customer priorities. You define the reduction depending on whether the machine is up (working), or down (not working).

Select **Exit (F3)** to leave the enquiry.

Enquire on Special Serial Numbers [31/EQM]

Use this enquiry to display the response times for specific [model](#) and [serial number](#) combinations, with account or address codes and [installation site](#) names.

Special Serial Number Enquiry Selection Window

To display this window, select the Enquire on Special [Serial Numbers](#) [task](#).

Use this window to select the [serial number](#) and [model](#) for which you want to display the details.

Fields

Serial Number

Enter the [serial number](#) on which to enquire.

Model

Enter the [model](#) on which to enquire.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: Leave the [serial number](#) field blank to display all the [serial numbers](#) for this [model](#).

Functions

List of Serial Numbers (F6)

Use this to display a list of the [serial numbers](#) for which you have entered a response time on the Special [Serial Number](#) Enquiry window. You can then select one to display the Special [Serial Number](#) Enquiry Detail window.

Press Enter to display the Special [Serial Number](#) Enquiry Detail window.

Special Serial Number Enquiry Detail Window

To display this window, enter a [serial number](#) and [model](#) and then press Enter on the Special [Serial Number](#) Enquiry Selection window.

Alternatively, select a [serial number](#) from the list on the Special [Serial Number](#) Enquiry window.

For the selected [model](#) and [serial number](#), this window displays the customer account and address details and [installation site](#) name, with the response time defined for the machine.

Select **Exit (F3)** to leave the enquiry.

Enquire on Labour Price List [21/EQI]

Use this enquiry to display [contract](#) and non-[contract](#) labour rates and travel rates.

You can select and display labour price list details by specified currency.

Labour Price List Enquiry Selection Window

To display this window, select the Enquire on Labour Price List [task](#).

Use this window to select the labour price list and currency for which you want to display the details.

Fields

Price List Code

Enter a price list.

Alternatively, use the prompt facility to select from the Price List Selection pop-up.

Currency Code

Enter a currency code.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Note: A price list, currency and effective date combination identifies a set of hourly labour rates. Equipment Servicing uses these to price chargeable Field Service and Workshop [jobs](#) and the hourly travel labour rate to price chargeable customer travel.

Press Enter to display the Labour Price List Enquiry Rates window.

Labour Price List Enquiry Rates Window

To display this window, enter or select a price list and currency and then press Enter on the Labour Price List Enquiry Selection window.

The information displayed on this window includes the price list, the currency used and the effective date.

The rates displayed are:

Select **Exit (F3)** to leave the enquiry.

Enquire on Invoice [22/EQI]

Use this enquiry to display the details of a service invoice or credit note on an ad hoc basis.

Invoice Enquiry Selection Window

To display this window, select the Enquire on Invoice [task](#).

Use this window to select the invoice or credit note for which you want to display the details.

Fields

Invoice Number

Enter an existing invoice, using I plus six numeric characters.

Credit Number

Enter an existing credit note, using C plus six numeric characters.

Statement Account

Enter a statement account to display all invoices or credit notes for the account and the [locations](#) for which this is the statement account.

Site Account

Enter an account number.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

If you enter just the account number and then press Enter, all the [locations](#) for the customer are displayed.

Locn

Enter the [location](#) for the entered [site](#) account.

Enter your criteria and then press Enter. The window displayed depends on the fields you completed.

Statement Account Window

To display this window, enter a statement account and then press Enter on the Invoice Enquiry Selection window.

Use this window to select the invoice or credit for which you want to display the details. For each invoice or credit, the number, date, value, currency and customer details are displayed.

Functions**Base Value/Prime Value (F14)**

Use this to toggle the between displaying base and prime currency.

Select an invoice or credit note to display the relevant [Job](#) Invoice Summary window.

Site Address Window

To display this window, complete the [Site](#) Account and Locn fields and then press Enter on the Invoice Enquiry Selection window.

Use this window to select the invoice or credit for which you want to display the details. For each invoice or credit, the number, date, value, statement account and currency are displayed.

Functions**Base Value/Prime Value (F14)**

Use this to toggle between displaying the values in prime and base currency.

Select an invoice or credit to display the relevant [Job](#) Invoice Summary window.

Job Invoice Summary Window

To display this window, select an invoice or credit note for a [job](#) on either the Statement Account window or the [Site](#) Address window.

Use this window to select the [job line](#) for which you want to display more details.

This window also displays the total invoice value and invoice name and address details.

Options**Destination details**

Use this to display the GL details for the selected line

Tax Breakdown

Tax engine only

Use this to display the taxes for the selected line

Functions**Base Value/Prime Value (F14)**

Use this to toggle between displaying values in prime and base currency.

Tax (F22)

Tax engine only

Use this to display the invoice taxes

Select a line to display the [Job](#) Invoice Detail window.

Job Invoice Detail Window

To display this window, select a [job](#) on the [Job](#) Invoice Summary window.

This shows each charge type on a different line. The charge types include fixed travel, fixed labour, labour hours and mileage. For each charge type, the [job category](#), rate, value and Tax information are displayed.

Functions

Fold/Truncate (F13)

Use this to display extra details for each line.

Base Value/Prime Value (F14)

Use this to toggle between displaying values in base and prime currency.

Select **Exit (F3)** to leave the enquiry.

Contract Invoice Summary Window

To display this window, select an invoice or credit note for a [contract](#) on either the Statement Account window or the [Site](#) Address window.

Use this window to select the [contract](#) for which you want to display more details.

This window also displays the total invoice value and invoice name and address details.

Options**Destination details**

Use this to display the GL details for the selected [contract](#)

Tax Breakdown

Tax engine only

Use this to display the taxes for the selected [contract](#)

Functions**Base Value/Prime Value (F14)**

Use this to toggle between displaying values in prime and base currency.

Tax (F22)

Tax engine only

Use this to display the invoice taxes

Select a [contract](#) to display the [Contract](#) Invoice Detail window.

Contract Invoice Detail Window

To display this window, select a [contract](#) on the [Contract](#) Invoice Summary window.

This window displays the details for the selected [contract](#) invoice. These details include the [contract](#) dates and type, the [model](#) and [serial number](#), and value and type of charge.

Functions

Fold/Truncate (F13)

Use this to toggle the display between summary information and extra details.

Base Value/Prime Value (F14)

Use this to toggle between displaying values in base and prime currency.

Select **Exit (F3)** to leave the enquiry,

Sundry Invoice Detail Window

To display this window, select an invoice for a sundry charge on either the Statement Account window or the [Site](#) Address window.

This window displays the account and value details for the sundry invoice selected.

Options

Tax Breakdown

Tax engine only

Use this to display the taxes for the selected line

Functions

Base Value/Prime Value (F14)

Use this to toggle between displaying values in base and prime currency.

Text (F21)

Use this to display any invoice or credit note text.

Tax (F22)

Tax engine only

Use this to display the invoice taxes

Select **Exit (F3)** to leave the enquiry.

Enquire on Job History [40/EQS]

Use this [task](#) to enquire on the details of both current and completed [jobs](#) against equipment. This displays the service history of the equipment and the SAC code at [job](#) header level.

This enquiry displays the following details:

Note: You can also access this enquiry from [Call Logging](#).

Job History Window

To display this window, select the Enquire on [Job](#) History [task](#).

Use this window to enter the information required to select the correct [job](#).

Fields

You can select one of the following criteria, with additional choices of scheduled or [call](#) out [jobs](#) and status ranges. You can choose to display summary or details and select name or information flags.

Note: Selections by [branch](#) or [model](#) may result in very long lists. Please use this with care.

Jobs for the Branch

Enter **1** to view all [jobs](#) for the [branch](#).

Jobs for Customer/Location

In the first field, enter a customer number to view all [jobs](#) for the customer account number across all [sites](#).

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

In the second field, enter an account address to view all [jobs](#) for the customer account number for that one address.

Jobs for Job Category

Enter a [job category](#) to view all [jobs](#) for the [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Jobs for Job Number

Enter a [job](#) number to view one [job](#). Remember that a [job](#) may have many lines to it and you can select only the lines in a certain status.

You can use the prompt facility on this field to select from the Select [Job](#) Header pop-up.

Jobs for Customer Order Number

Enter a customer order number to view all [jobs](#) that have this customer order number.

Jobs for Team Number

Enter a team number to view all [jobs](#) that have this team number.

Alternatively, use the prompt facility to select from the Team Description pop-up.

Jobs for Technician Number

Enter a technician number to view all [jobs](#) that have been assigned to this technician.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Jobs for Serial Number

Enter a [serial number](#) to view all [jobs](#) for this [serial number](#).

Jobs for Model Number

Enter a [model](#) number to view all [jobs](#) for this [model](#) number.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Note: You must enter a [model](#) and serial combination that exists on the [Installation](#) file.

Jobs for Model Hierarchy

Enter a [model](#) hierarchy to view all [jobs](#) for this [model](#) hierarchy.

You can enter [division](#) alone, [division](#) and [model](#) group or [division](#), [model](#) group and [model](#) sub-group.

You can use the prompt facility on these fields to select from the [Division](#) Selection, [Model](#) Group Selection and [Model](#) Subgroup Selection pop-ups.

Functions

Save Preferences (F14)

Use this save the current values on the window to be restored every time you use this [task](#).

Enter the selection criteria required and then press Enter to display the [Job](#) History Selection window.

Job History Selection Window

To display this window, enter your selection criteria and then press Enter on the [Job](#) History window.

Use this window to select the [job](#) for which you want to display the [job](#) history details. For each [job](#), the [job](#) number, [model](#) number, [serial number](#), [job category](#), fault, date and time are displayed.

Fields

Select

Enter one of the following to select the enquiry required.

Alternatively, use the prompt facility to select from the [Job](#) History Enquiry Options pop-up.

- 01 - [Job cost](#) view

Use this to view the [costs](#) associated with the [job](#) structure.

- 02 - [Job](#) resource view

Use this to view the resources associated with the [job](#) structure.

- 03 - [Job](#) details enquiry

Use this to view the [job](#) details for the line selected.

- 04 - Invoice enquiry

Use this to view the invoices associated with the [job](#).

- 05 - [Quotation](#) enquiry

Use this to view the [quotation](#) that was used to create this [job](#), if there is one.

- 06 - [Job](#) structure view

Use this to view the [job](#) structure.

- 07 - Transaction enquiry

Use this to view the transactions associated with the [job](#).

- 08 – Fiscal Document Type enquiry

Use this to view the fiscal type for the line selected.

- 09 – Indian Details

Use this to view India SAC details

Enter or select an option and then press Enter to perform the selected function.

Job Cost View Window

To display this window, select 01 against a line and then press Enter on the [Job](#) History Selection window.

This window displays the [costs](#) associated with the [job](#) structure.

Options

Select

Use this to view financial details for the selected [job line](#) on the Financial Details window.

Transactions

Use this to see all transactions for the selected [job line](#) on the Transaction Enquiry pop up.

Functions

Structure View (F14)

Use this to display the [job](#) structure view.

Resource View (F18)

Use this to display the [job](#) resource view.

Enter an option and then press Enter or select a function.

Job Resource View Window

To display this window, select **Resource View (F18)** on the [Job](#) History Selection window.

This window displays the resources associated with the [job](#) structure.

Fields

Select

Enter **9** to display the [Job](#) History Line Detail window.

Functions

Structure View (F14)

Use this to display the [job](#) structure view.

Cost View (F16)

Use this to display the [job cost](#) view.

Enter 9 against a line and then press Enter or select a function.

Job Details Enquiry Window

To display this window, enter 03 against a line and then press Enter on the [Job](#) History Selection window.

Alternatively, select 9 against a line and then press Enter on the [Job](#) Structure View window.

This window displays the [job](#) details for the selected [job line](#). These details include:

For details of the fields and functions, refer to the [Call](#) Logging section in the Equipment Servicing Operations chapter of this product guide.

Functions

Equip Enquiry (F5)

Use this to display the Equipment Detail Enquiry window.

Contract (F6)

Use this to display the [cover type/job category](#) charge matrix.

Text (F7)

Use this to display [job](#) story text for the [job](#).

Peripherals (F13)

Use this to display the Peripherals Enquiry window.

Accessories (F14)

Use this to display the Accessories/Condition Enquiry window.

Transactions (F15)

Use this to display the transactions that have been posted to this [job line](#) on the [Job](#) Value Summary window.

Financials (F17)

Use this to display the financial information associated with the [job line](#).

Equip Dtl (F18)

Use this to display the Equipment Detail Enquiry window.

Audit (F19)

Use this to display the [Job](#) Audit Enquiry pop-up, which lists any status changes made to the [job line](#), with the most recent change at the top of the list. If the [Job](#) Details window is for the prime [job](#), this audit pop-up will show status changes for all the [job lines](#).

More Dtls (F22)

Use this to display the Additional [Job](#) Details pop up.

Name/Address (F23)

Use this to display a pop-up showing the name and address for the customer.

Select **Previous (F12)** to return to the previous window.

Invoice Enquiry Window

To display this window, enter 04 against a line and then press Enter on the [Job](#) History Selection window.

This window displays the invoices associated with the [job line](#).

Select **Previous (F12)** to return to the previous window.

Quotation Enquiry Window

To display this window, enter 05 against a line and then press Enter on the [Job](#) History Selection window.

This window displays the [quotation](#) associated with this [job](#), if there is one.

Select **Previous (F12)** to return to the previous window.

Job Structure View Window

To display this window, enter 06 against a line and then press Enter on the [Job](#) History Selection window.

This window displays the [job](#) structure.

Fields

Select

Enter one of the following:

- 3 - To display the View Details pop-up
- 5 - To display the [Job](#) Parts Demand Enquiry window
- 7 - To display the Sub-[contract](#) Details pop-up
- 8 - To enquire on purchase orders for the [job](#)
- 9 - To display the [Job Line](#) Details Enquiry window

Select an option and then press Enter or select **Previous (F12)** to return to the previous window.

Financial Details Window

To display this window, select a [job line](#) on the [Job Cost](#) View window.

Use this window to view financial information about the [job](#).

This window displays the financial details for the selected [job](#), including the customer, [job](#) type, price type, status and income currency.

For each [cost](#) and income, rolled up and this level values are displayed.

Note: Use *Page Up* and *Page Down* to display all the [cost](#) and income fields.

Functions

Commitments (F14)

Use this to display the commitments. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Invoices (F15)

Use this to display the details of all invoices on the Equipment Servicing Enquiry Invoices window.

Price Variances (F16)

Use this to display all the price variances on the Equipment Servicing Enquiry Price Variances window.

Stage Payments (F17)

Use this to display all the [stage payment](#) details on the Equipment Servicing Enquiry [Stage Payments](#) window.

Cost Breakdown This Level (F18)

Use this to show a summarised breakdown of [costs](#) for each [expense type](#) on the [Cost Breakdown Summary](#) window.

Cost Breakdown Indented (F19)

Use this to display a more detailed enquiry on transaction details on the Indented [Cost Breakdown Enquiry](#) window.

Alternative Budgets (F21)

Use this to show the finance details on this window with a different [budget](#).

Select **Previous (F12)** to return to the [Job Cost](#) Detail window.

Inventory Commitments (Sales Order Processing Parts) Window

To display this window, select Inventory on the Commitment Enquiry Selection pop-up. This is displayed when you select **Commitments (F14)** on any window in this [task](#) on which it is available.

Use this window to view the inventory commitments. The information displayed on this window includes:

Functions

Commitments (F14)

Use this to display the commitments. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Whole Order Enquiry (F15)

Use this to display the standard [Sales Order Processing](#) Whole Order Enquiry window. For more information, refer to the [Sales Order Processing](#) product guide.

Select **Previous (F12)** to return to the Financial Details window.

Labour Commitments Pop-up

To display this pop-up, select Labour on the Commitment Enquiry Selection pop-up. This is displayed when you select **Commitments (F14)** on any window in this [task](#) on which it is available.

This pop-up displays the labour commitments for the selected [job](#). The details displayed include:

Functions

Commitment (F14)

Use this to display the commitments. The Commitment Enquiry Selection pop-up is displayed, on which you can select Inventory, Labour or Purchasing.

Select **Previous (F12)** to return to the Financial Details window.

Purchasing Commitments Window

To display this window, select Purchasing on the Commitment Enquiry Selection pop-up. This is displayed when you select **Commitments (F14)** on any window in this [task](#) on which it is available.

Use this window to view the purchasing commitments. The information displayed on this window includes:

Options

Purchase Details

Use this to view the details of the purchase order.

Functions

Commitment (F14)

Use this to select a different type of commitment to display.

Select **Previous (F12)** to return to the Financial Details window.

Equipment Servicing Enquiry Invoices Window

To display this window, select **Invoices (F15)** on the Financial Details window.

This window displays the details of all invoices and credit notes raised against the selected [job](#). The top of the window displays the basic customer and [job](#) details. The details displayed include:

Options

Invoice Details

Use this to view the details of the invoice. For more details, refer to the Enquire on Invoice section.

Functions

Base/Prime (F14)

Use this to toggle the values in the window between prime currency and base currency.

Select **Previous (F12)** to return to the Financial Details window.

Equipment Servicing Enquiry Price Variance Window

To display this window, select **Price Variances (F16)** on the Financial Details window.

This window displays the details for each price variance. The top of the window displays the basic customer and [job](#) details. The details displayed for each price variance include:

The software creates a variance record whenever you change the [budget](#), selling price or estimated hours.

Select **Previous (F12)** to return to the Financial Details window.

Equipment Servicing Enquiry Stage Payments Window

To display this window, select [Stage Payments \(F17\)](#) on the Financial Details window.

This window displays the details for each [stage payment](#). The top of the window displays the basic customer and [job](#) details.

Fields

Select

Select one of the following:

Payment details - To display the details of the [stage payment](#) on the [Stage Payment](#) Details window

Text - To display any text associated with this [stage payment](#)

Select **Previous (F12)** to return to the Financial Details window.

Stage Payment Details Window

To display this window, select Payment Details against a [stage payment](#) on the Equipment Servicing Enquiry [Stage Payments](#) window.

This window displays the details of the [stage payment](#). These details include:

Functions

Release Breakdown (F13)

Use this to display a release breakdown for a [stage payment](#). For each released [cost](#), the details displayed include the document reference, release value, currency and [cost](#).

Select **Previous (F12)** to return to the previous window.

Cost Breakdown Summary Window

To display this window, select [Cost Breakdown This Level \(F18\)](#) on the Financial Details window.

This window displays a summarised breakdown of [costs](#) against [expense types](#). If you [budget](#) against [expense type](#), the [budgets](#) are shown against their actual [costs](#) to date. The variance of actual [costs](#) against [budget costs](#) is shown.

Fields**Total Cost**

The total [cost](#) value relates to the total of [expense types](#) for this [job](#) detail.

Select

Select one of the following:

Display details - To display the transactions that make up the actual [cost](#) of this [expense type](#) on the [Cost Breakdown List](#) window

[Costs](#) by period - To display the [costs](#) by period on the Actual [Cost Breakdown by GL Period](#) window

Functions**Rolled Up/This Level (F13)**

Use this to toggle between displaying the rolled up values and the this-level values. If you are displaying [task](#) details, the rolled up values are the same as the this-level values.

Select Display Details against an [expense type](#) to display the [Cost Breakdown List](#) window.

Cost Breakdown List Window

To display this window, select Display Details against an expense on the [Cost Breakdown Summary](#) window.

This window displays the transactions for the selected [expense type](#). For each line, the [transaction source](#), type and date, any internal reference and [cost](#) values are displayed.

The total [cost](#) at the top of the window is the total value of the selected [expense type](#) for this [job](#) detail.

Options**Display Details**

Use this to display the details of this transaction on the [Cost Breakdown Details](#) window.

Functions**Reverse Sequence (F9)**

Use this to reverse the sequence in which the transactions are displayed.

Select **Previous (F12)** to return to the previous window.

Cost Breakdown Details Window

To display this window, select Display Details against a transaction expense on the [Cost](#) Breakdown List window.

This window displays information for both [cost](#) and income.

Fields

RC Doc Ref.

This field displays the [cost](#) release document number. If it is displayed as *****, there is more than one [cost](#) release document.

***Note:** If it is displayed as ***, select **Destination details (F14)** to list the documents.*

RI Doc Ref.

This field displays the revenue release document number. If it is displayed as *****, there is more than one revenue release document.

***Note:** If it is displayed as ***, select **Destination details (F14)** to list the documents.*

Functions

Release Cost Breakdown (F13)

If you posted a [cost](#) to a fixed price [job](#), use this to display details of all transfers to Profit and Loss or to Fixed Assets.

Destination Details (F14)

If transactions have been posted to the [General Ledger](#), use this to display the details. The release date and release value are displayed on the EQ/GL Drill Down Enquiry window.

Select **Exit (F3)** to leave the enquiry.

Actual Cost Breakdown by GL Period Window

To display this window, select [Costs](#) by Period against an [expense type](#) on the [Cost](#) Breakdown Summary window.

For each GL period, this window displays the this-level and rolled up [costs](#).

Options

Transactions

Use this to display the transactions that make up the [costs](#) for the selected period.

Select Transactions against a period to display the [Cost](#) Breakdown List window.

Indented Cost Breakdown Enquiry Window

To display this window, select **Cost Breakdown Indented (F19)** on the Financial Details window.

This window displays an indented breakdown of the rolled up [costs](#). You can use this to display a more detailed enquiry on transaction details.

For each [job](#), [sub-job](#) and [task](#), this window displays the total [cost](#) at this level and rolled up, and the source of the [cost](#).

Fields

Values to Display (5 Fields)

In the first and third field, enter the values you want to display in the two columns.

In the second and fourth field, enter one of the following:

- 0 - To display the selected value for this level only
- 1 - To display the selected rolled up value

In the fifth field, enter one of the following:

- 0 - To display summary data
- 1 - To display information by [expense type](#), where available

Options

Select

Use this to select a [job](#) detail line to display more details on the level [costs](#). This displays the [Cost Breakdown Summary](#) window.

Select **Exit (F3)** to leave the enquiry.

Transaction Enquiry Window

To display this window, enter 07 against a line on the [Job](#) History Selection window.

This window displays the GL transactions associated with the [job](#).

Options

Select

Use this to display more details for a line.

Select a line to display the Transaction Enquiry More Details window.

Transaction Enquiry More Details Window

To display this window, select a line on the Transaction Enquiry window.

This window displays the GL transactions associated with the [job](#).

Select **Previous (F12)** to return to the Transaction Enquiry window,

Accessories/Condition Enquiry Window

To display this window, select **Accessories (F14)** on the [Job](#) Details Enquiry window.

This window displays the accessories for the piece of equipment. The details displayed include:

Select **Previous (F12)** to return to the [Job](#) Details Enquiry window.

Job Value Summary Window

To display this window, select **Transactions (F15)** on the [Job](#) Details Enquiry window.

Options

Further Details

Use this to display the [Job](#) Transaction Values window.

Select **Previous (F12)** to return to the [Job](#) Details Enquiry window.

Job Transaction Values Window

To display this window, select Further Details against a [job line](#) on the [Job](#) Value Summary window.

Options

Start/End

Use this to display the [timesheet](#) line start date and time and end date and time.

Select **Previous (F12)** to return to the [Job](#) Value Summary window.

Job Transaction Values

Options

Purchase Transaction

Use this to display the Equipment Servicing Enquiry – Associate Purchase Transaction detail panel.

Note: This selection will only be available if the expense line is a Purchase Management expenses.

Select **Previous (F12)** to return to the [Job](#) Value Summary window.

Equipment Servicing Enquiry – Associated Purchase Transaction Enquiry

To display this window, select **1=Purchase Transaction** in the [Job](#) Transaction Values – Expenses window.

Use this window to display all information linking the Purchase Management receipt / return transaction and the associated Equipment Servicing transaction. The Debit note number is only displayed if the Purchasing transaction is a return.

Select **Previous (F12)** to return to the [Job](#) Transaction Value window.

Display Daily Arrival and Departure Times Pop-up

To display this pop-up, select Start/End against a line on the [Job](#) Transaction Values window.

Use this pop-up to view the start date and time and the calculated end date and time.

Fields

End Date & Time

This field is calculated by adding the [job](#) duration to the start date and time.

Select **Previous (F12)** to return to the [Job](#) Transaction Values window.

Job Audit History Pop-up

To display this pop-up, select **Audit (F19)** on the [Job](#) Details Enquiry window.

This pop-up displays the status history of the [job line](#). If the [Job](#) Details Enquiry window is displayed for the prime [job](#), this audit window will show status changes for all the [job lines](#).

Select **Previous (F12)** to return to the [Job](#) Details Enquiry window.

Enquire on Escalations [41/EQS]

Use this [task](#) to enquire on outstanding equipment servicing [jobs](#) close to, or exceeding, their response time guarantee.

Use this enquiry frequently to monitor and take action on [jobs](#) approaching a critical status.

Concepts

Equipment Servicing alerts you to any outstanding [jobs](#) approaching their designated response time. [Job](#) escalation runs whenever the Equipment Servicing subsystem is active.

In this enquiry, each [job](#) is stamped with a target response date and time.

For unscheduled [jobs](#), the target date and time is the date and time the [call](#) was logged, (or the appointment date and time if entered), plus the response hours from the [Call Logging](#) window (from the [contract](#)). It also takes into account the service window defined in the [company](#) profile and the working and non-working days defined in the Daily Calendar file.

For scheduled [jobs](#), the target date is the last working day of the [service period](#) in which the [visit](#) is due, and the target time is the start time of the service window.

A continuous batch [job](#) runs, which regularly re-calculates the escalation step of all [jobs](#) within the escalation time fence with a status of eligible for escalation. The step is calculated as:

$(\text{target time} - \text{current time}) / \text{reporting interval for escalation}$

rounded up to the nearest integer. This means that the escalation step moves from high to low value as a [job](#) moves towards its target time. Step 00 means that the [job](#) has either reached or gone beyond its target time.

Note: *Equipment Servicing assumes a seven-day working week. For example, Workshop escalates Monday's [jobs](#) on Sunday, not on the preceding Friday.*

Escalation Enquiry Selection Window

To display this window, select the Enquire on Escalations [task](#).

Use this window to select the [job](#) for which you want to see the details.

Fields

Note: *You must enter either a technician or a team or set the All [Jobs](#) for the [Branch](#) field to 1.*

Jobs Assigned to Technician

Enter a technician to display a list of all [job lines](#) currently assigned to this technician, irrespective of the [job line branch](#), which satisfy the other selection criteria.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

Jobs for a Team

Enter a team to display a list of all [job lines](#) currently assigned to this team, irrespective of the [job line branch](#), which satisfy the other selection criteria.

Alternatively, use the prompt facility to select from the Team Description pop-up.

All Jobs for the Branch (1)

Enter one of the following:

- 0 - Not to display all [jobs](#) for the [branch](#)

You must use this if you entered either a technician or team.

- 1 - To display a list of all [job lines](#) for the current [branch](#) that satisfy the other selection criteria

Planned Jobs (1) Or Callouts (2)

Enter one of the following:

Blank - To display all [job lines](#) that satisfy the other selection criteria

- 1 - To display only planned maintenance [job lines](#) that satisfy the other selection criteria
- 2 - To display only breakdown [job lines](#) that satisfy the other selection criteria

Contracted Responses Only? (1/0)

Enter one of the following:

- 0 - To select all [jobs](#), whether they are covered by a [contract](#) or not
- 1 - To select only [jobs](#) for pieces of equipment covered by [contract](#), and therefore having a [contracted](#) response time

Escalation Step

Enter the escalation step, between 00 and 98, for which you want to display [jobs](#) lines.

Leave this field blank to display all [job lines](#).

Status Range/To

Enter the status range for which you want to display [job lines](#).

You can use the prompt facility on this field to select from the [Job Line](#) Status pop-up.

Enter the selection criteria and then press Enter to display the Escalation Enquiry Detail window.

Escalation Enquiry Detail Window

To display this window, enter the selection criteria and then press Enter on the Escalation Enquiry Selection window.

This window shows the [jobs](#) that meet the entered selection criteria. You can select any of the [jobs](#) to display more details.

The details displayed for each [job](#) include the customer details, equipment details, fault, [job](#) number, status and category, the target date and time, and the escalation step.

Options

Select

Use this to select a line and display the [Job](#) Details Enquiry window.

Functions**Fold/Truncate (F13)**

Use this to display extra details for each [job line](#).

Select a [job line](#) to display the [Job](#) Details Enquiry window.

Enquire on Branch Workload [42/EQS]

Use this [task](#) to display the projected workload for the next 16 working hours, based on the duration of [jobs](#) and the available technicians' working hours.

This displays the workload in two-hour time slots, starting from the current time. It only displays working hours, as derived from the service window.

The calculation is based on the total [job](#) duration of [calls](#), with a target time falling within the two-hour slot, divided by the total available technician hours for the slot. The result is multiplied by 100, to express the load as a percentage.

The Workload program includes [jobs](#) in two-hour slots, based on their target time; it takes no account of [job](#) duration, which falls outside that two-hour slot.

Branch Workload Enquiry Detail Window

To display this window, select the Enquire on [Branch](#) Workload [task](#).

The window displays the loading on a district (a team, or group of teams). The two-hour periods show the comparison between the available technician time and the time already allocated to [jobs](#), with the result expressed as the colour-coded percentage load.

The colour of the block represents the percentage load as follows:

Select **Exit (F3)** to leave the enquiry.

Enquire on Outstanding DRP Order [43/EQS]

Use this [task](#) to enquire on outstanding DRP orders and their associated Equipment Servicing [jobs](#).

Only DRP orders raised in association with an Equipment Servicing [job](#) are visible within this enquiry.

Outstanding DRP Order Enquiry Window

To display this window, select the Enquire on Outstanding DRP Order [task](#).

Fields

Note: Leave all four fields blank to list all outstanding DRP orders for the current [company](#) and [branch](#).

Note: You should only complete one field.

DRP Order Number

Enter the DRP order on which you want to enquire.

Job Number

Enter the [job](#) associated with the DRP order on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Technician's Stockroom

Enter the stockroom associated with the DRP order on which you want to enquire.

Technician Number

Enter the technician associated with the DRP order on which you want to enquire.

Alternatively, use the prompt facility to select from the Technician Selection pop-up.

When you have entered your criteria, press Enter.

If you did not specify an order or [job](#), the Outstanding Parts Orders Enquiry Selection window is displayed.

If you selected an order or a [job](#), the Outstanding Parts Orders Enquiry Detail window is displayed.

Outstanding Parts Orders Enquiry Selection Window

To display this window, leave the DRP Order Number and [Job](#) Number fields blank and then press Enter on the Outstanding DRP Order Enquiry window.

This window lists the outstanding orders for the stockroom, technician or current [company](#) and [branch](#), depending on the selection you made on the Outstanding DRP Order Enquiry window.

Options

Job Detail

Use this to display the [job](#) detail for this order on the [Job Line](#) Detail window

Order Detail

Use this to display the order detail for this order on the Outstanding Parts Orders Enquiry Detail window

Press Enter. If you select Order Detail against an order, the Outstanding Parts Orders Enquiry Detail window is displayed.

Outstanding Parts Orders Enquiry Detail Window

To display this window, enter an order or [job](#) and then press Enter on the Outstanding DRP Order Enquiry window.

Alternatively, select Order Detail against an order on the Outstanding Parts Orders Enquiry Selection window.

All the items for the order are listed, with the item description, quantity ordered and quantity despatched.

Select **Exit (F3)** to leave the enquiry.

Enquire on Warranty Claim History [20/EQW]

Use this enquiry to display the details of all warranty claims and warranty claim [jobs](#).

Warranty Claim Enquiry Selection Window

To display this window, select the Enquire on Warranty Claim History [task](#).

Use this window to select the machine or customer for which you want to display the claim details.

Fields

Note: You can enter the [status code](#) alone or the [status code](#) and one of the other selection fields.

Status Code

Enter the status of the claim you want to display.

Alternatively, use the prompt facility to select from the Warranty Claim Function List pop-up.

Model Hierarchy – Division

Enter the [division](#) code of the claims that you want to progress.

Alternatively, use the prompt facility to select from the [Division](#) Code List pop-up.

Model Hierarchy – Model group

Enter the [model](#) group of the claims that you want to progress. The [model](#) group will be a valid [model](#) group for the [division](#) code entered.

Alternatively, use the prompt facility to select from the [Model](#) Group List pop-up.

Model Hierarchy – Model sub group

Enter the [model](#) sub group of the claims that you want to progress. The [model](#) sub group will be a valid [model](#) sub group for the [division](#) code and [model](#) group entered.

Alternatively, use the prompt facility to select from the [Model](#) Sub Group List pop-up.

Claim Number

Enter the claim number you want to display.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Account Number

Enter the customer you want to display.

Alternatively, use the prompt facility to select from the Customer Scan pop-up.

Address Code

Enter the address for the specified customer.

Model Number

Enter the [model](#) for the warranty claim.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Serial Number

Enter the [serial number](#) of the equipment.

Claim Reference No.

Enter the warranty claim reference number.

Enter your selection details and then press Enter to display the Warranty Claim Enquiry Claim Selection window.

Warranty Claim Enquiry Claim Selection Window

To display this window, enter your selection details and then press Enter on the Warranty Claim Enquiry Selection window.

Use this window to select the claim for which you want to display the details.

For each claim, the window displays the number, action, [branch](#), creation date, customer and equipment details.

Options**Details**

Use this to display the Warranty Claim Enquiry Header window.

Parts

Use this to display the Warranty Claim Enquiry Parts window.

Text

Use this to view the text associated with the warranty claim.

Select **Exit (F3)** to leave the enquiry.

Warranty Claim Enquiry Header Window

To display this window, select Details against a claim on the Warranty Claim Enquiry Claim Selection window.

This window displays the customer, [model](#), purchase and [job](#) details for the claim. It also shows the reject reasons and whether they are active. The [job](#) details include the repair time, reference numbers, claim type, symptoms and repairs.

Functions**Text (F7)**

Use this to display the text associated with this warranty claim.

Parts (F14)

Use this to display the Warranty Claim Enquiry Parts window.

End User (F15)

Use this to display the name and address details for the end user.

Original Dealer (F16)

Use this to display the name and address details for the original dealer.

Name/Address Override (F17)

Use this to display the override customer details. This name and address is printed on any credit note produced.

Orig. Claim (F18)

Use this to display the Warranty Claim Original Data window.

Claim Progress (F20)

Use this to display the Claim Progress pop-up.

Document History (F22)

Use this to display the document history for this claim.

Select **Previous (F12)** to return to the Warranty Claim Enquiry Claim Selection window.

Warranty Claim Enquiry Parts Window

To display this window, select Parts against a claim on the Warranty Claim Enquiry Claim Selection window.

This window displays the customer, [model](#), and labour credit number and the parts on the warranty claim. For each part, this window displays the quantity received and required, the machine section, defect, repair and invoice details.

Fields

Select

Select one of the following:

Reject codes enquiry - To display a list of all the reject codes for this claim

Invoice search- To display a list of all the claims on an invoice

Functions

Text (F7)

Use this to display the text associated with this warranty claim.

Toggle Desc (F13)

Use this to toggle the window between one and two lines of details for each part.

End Users (F15)

Use this to display the name and address details for the end user.

Original Dealer (F16)

Use this to display the name and address details for the original dealer.

Name/Address Override (F17)

Use this to display the override customer details. This is the name and address that is printed on any credit note produced.

Orig Claim (F18)

Use this to display the Warranty Claim Original Data window.

Claim Progress (F20)

Use this to display the Claim Progress pop-up.

Document History (F22)

Use this to display the document history for this claim.

Select **Previous (F12)** to return to the Warranty Claim Enquiry Claim Selection window.

Enquire on Model Failure Analysis [21/EQW]

Use this enquiry to give a quick summary view of common fault problems.

This is to help improve your technical support.

Model Failure Analysis Selection Window

To display this window, select the Enquire on [Model](#) Failure Analysis [task](#).

Use this window to select the [model](#) and date for which you want to view the failures.

Fields

Model Number

Enter the [model](#). This must be a [model](#) defined in the [Model](#) file.

Alternatively, use the prompt facility to select from the [Model](#) Master Scan pop-up.

Date Range/To

Enter or select the range of dates you wish to analyse.

You can leave the From date blank.

If entered, the From date must be less than the To date

The To date defaults to the current date and cannot be greater than the current date.

Enter the [model](#) and date range and then press Enter to display the [Model](#) Failure Analysis window.

Model Failure Analysis Window

To display this window, enter the [model](#) and date range and then press Enter on the [Model](#) Failure Analysis Selection window.

This window displays all the warranty claims for the [model](#) in the date range. The information displayed is the condition, symptom, description, and total number of claims for this fault.

Select a condition to display the [Model](#) Failure Analysis Parts Details window.

Model Failure Analysis Parts Details Window

To display this window, select a condition on the [Model](#) Failure Analysis window.

This window displays, for the condition selected, the parts, machine section affected, defect, repair, and the total number of claims. The [model](#), date range, condition and symptom selected previously are displayed at the top of the window.

Select **Previous (F12)** to return to the [Model](#) Failure Analysis window.

Enquire on Session [15/EQO]

Use this enquiry to display the transaction details for a specified session.

From this enquiry, you can view transaction, source and destination details.

Enquiry by Session Selection Window

To display this window, select the Enquire on Session [task](#).

Use this window to select the enquiry for which you want to display details.

Fields

Enter Session Number

Enter the number of the session required.

Alternatively, use the prompt facility to select from the Session Enquiry window.

Source

Enter a [transaction source](#).

Alternatively, use the prompt facility to select from the Select [Transaction Source](#) pop-up.

Reference

Enter a document reference using all eight characters. For example, if the transaction reference is 999, enter 00000999.

Note: *You cannot complete all three fields. Complete either the Session Number field, or both the Source and Reference fields.*

Enter a source and reference and then press Enter to display the [Cost](#) Breakdown Details window.

Alternatively, enter a session number and then press Enter to display the Enquiry by Transaction Reference List window.

Enquiry by Transaction Reference List Window

To display this window, enter a session number and then press Enter on the Enquiry by Session Selection window.

This window displays the session details and for each transaction:

Fields

Select

Select one of the following:

Select transaction details- To display the [Cost](#) Breakdown Details window for this transaction

Source details - To display the source application transaction enquiry, if the source is EQ

Destination details - To display the details, if transactions have been posted to the [General Ledger](#)

Select **Exit (F3)** to leave the enquiry.

Enquire on Cost/Price List [17/EQO]

Use this [task](#) to enquire on [cost](#) and price lists set up for [jobs](#).

Cost/Price List Enquiry Selection Window

To display this window, select the Enquire on [Cost/Price List task](#).

Use this window to select the price list for which you want to display details.

Fields

List Type

Select one of the following:

- [Cost](#) - To display a [cost](#) list
- Prices - To display a price list

List Code

Enter the list on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Cost](#) List pop-up or the Select Price List pop-up.

Currency Code

You must enter the currency of the list.

Alternatively, use the prompt facility to select from the Select Currency pop-up.

Effective Date

Enter or select a date to display the list effective on that date.

This field defaults to the system date.

Press Enter to display the [Cost/Price List Enquiry Details](#) window.

Cost/Price List Enquiry Details Window

To display this window, enter the selection criteria and then press Enter on the [Cost/Price List Enquiry Selection](#) window.

This window displays the details of the selected list. These details include:

Select **Exit (F3)** to leave the enquiry.

Enquire on Job Category/Labour Price List [18/EQO]

Job Category/Labour Price List Window

To display this window, select the Enquire on [Job Category/Labour Price List task](#).

Use this window to specify the [job category](#) for which you wish to view the details.

Fields

Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category Selection](#) pop-up.

Enter or select a [job category](#) and then press Enter to display the [Job Category/Labour Price List Detail](#) window.

Job Category/Labour Price List Detail Window

To display this window, enter or select a [job category](#) on the [Job Category/Labour Price List](#) window.

The window lists all account number/[site](#) records for this [job category](#) in account number/[location](#) code/descending effective start date sequence.

It shows the customer, price list, start and end dates for the override labour price lists for the [job category](#).

Functions

Position List (F17)

Use this to select a specific customer from which to start the list.

Select **Exit (F3)** to leave the enquiry.

Enquire on Job by Asset Number [21/EQF]

Use this enquiry to identify all [job](#) details that are associated with a particular asset number.

Job Enquiry by Asset Number Selection Window

To display this window, select the Enquire on [Job](#) by Asset Number [task](#).

Use this window to select the [job](#) for which you want to display details.

Fields

Asset Number

Enter the asset number required.

Alternatively, use the prompt facility to select from the Select Asset pop-up.

Select an asset or enter an asset number and then press Enter to display the [Job](#) Enquiry by Asset Number Details window.

Job Enquiry by Asset Number Details Window

To display this window, select an asset number or enter an asset number and then press Enter on the [Job](#) Enquiry by Asset Number Selection window.

Options

Financial Details

Use this to display the Equipment Servicing Enquiry Financial Details window. For further information on this window, see the Equipment Servicing Operations chapter of this product guide.

Select **Previous (F12)** to return to the [Job](#) Enquiry by Asset Number Selection window or select **Exit (F3)** to leave the enquiry.

Enquire on Job Parts List [21/EQB]

If you use [Sales Order Processing](#), you can use this [task](#) to enquire on the status of Inventory items associated with a [job](#). You can also look at the stock availability against individual items.

Job Parts List Enquiry Selection Window

To display this window, select the Enquire on [Job Parts List task](#).

Use this window to select the [job](#) for which you want to display the part details.

Fields

Job

Enter the [job](#) header on which you want to enquire.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

Press Enter to display the [Job Parts List](#) Enquiry List window.

Job Parts List Enquiry List Window

To display this window, enter a [job](#) and then press Enter on the [Job Parts List](#) Enquiry Selection window.

Use this window to select the level for which you want to display details. For each level, the [job](#) name, description and sales order are displayed.

Options

SOP Parts List

Use this to display the order lines for the associated [Sales Order Processing](#) order.

The [Job Parts List](#) Enquiry Parts window is displayed.

Sales Order

Use this to display the [Sales Order Processing](#) Whole Order Enquiry.

For more information, refer to the [Sales Order Processing](#) product guide.

Select SOP [Parts List](#) against a [job](#) detail line to display the [Job Parts List](#) Enquiry Parts window.

Job Parts List Enquiry Parts Window

To display this window, select SOP [Parts List](#) against a [job](#) detail line on the [Job Parts List](#) Enquiry List window.

Use this window to select the part for which you want to display the stock availability. For each part, this window displays the part number, description, order quantity and despatched quantity.

Select a part to display the Inventory stock availability enquiry for a part. For more information on this topic, refer to the Inventory Management product guide.

Select **Exit (F3)** to leave the enquiry.

Enquire on Quote [31/EQG]

Use this [task](#) to display the details for a [quotation](#).

This displays the details you enter using the Maintain Quote [task](#). You cannot change any details using this [task](#).

Quotation Enquiry Selection Window

To display this window, select the Enquire on Quote [task](#).

The current [branch](#) name is now displayed at the top of the window.

Use this window to select the [quotation](#) and revision for which you want to display details.

Fields

Quote

Enter the [quotation](#) required.

Alternatively, use the prompt facility to select from the Select Quote Header pop-up.

Revision

Enter the revision required.

Alternatively, use the prompt facility to select from the Select Revision Level pop-up.

Customer/Address (Untitled)

If you do not know the [quotation](#) and revision number, enter the customer and then select the required [quotation](#) and revision from the displayed list.

You can use the prompt facility on this field to select from the Customer Scan pop-up.

Enter a [quotation](#) and revision and then press Enter. The [Quotation](#) Enquiry Details List window is displayed.

Quotation Enquiry Details List Window

To display this window, enter a [quotation](#) and revision and then press Enter on the [Quotation Enquiry Selection](#) window.

This window lists the [jobs](#) on which you can enquire. For each [job](#), this displays the [sub-job](#) and [task](#) numbers, the description, the total [cost](#), the price and the margin.

The Quote owning [branch](#) is now displayed on the window.

Fields

Option (Opt)

Enter one of the following:

- 3 - To display the [quotation](#) details on the Quote Enquiry Details window
- 5 - To display the parts on the [Quotation Enquiry Parts List](#) window.
- 6 - To display any expenses on the [Quotation Enquiry Expenses](#) window
- 7- To display details of any subcontract on the Subcontract Detail window.
- 9 - To display any text on the [Quotation Enquiry Text](#) window

Functions

Position List (F17)

Use this to position the cursor on the transaction that most closely matches the data entered.

All Parts View (F16)

Use this to view a list of all parts on the [quotation](#) and the [sub-job/task](#) for which they are required.

All Labour View (F18)

Use this to view a list of all labour transactions (labour and travel hours) on a [quotation](#) and details of the [sub-job/task](#) for which they are required.

Base/Prime (F20)

Use this to toggle between prices in prime/base.

Note: *It is only displayed if the customer's prime currency is not equal to base currency*

Select 3 against a [quotation](#) to display the Quote Enquiry Details window.

Quote Enquiry Details Pop-up

To display this pop-up, select 3 against a [quotation](#) on the [Quotation Enquiry List](#) window.

This information displayed on this pop-up includes:

Functions

Text (F14)

Use this to display [job](#) story text associated with the [job line](#).

Sub-Contract Details (F18)

Use this to display the [Quotation](#) Enquiry Subcontract pop-up

Select **Previous (F12)** to return to the [Quotation](#) Enquiry List window.

Quotation Enquiry Parts List Window

To display this window, enter 5 against a [quotation](#) on the [Quotation](#) Enquiry List window.

This information displayed on this window includes:

This table of parts is used as part of the [quotation](#) price calculation and will also be used as the basis of the required [parts list](#) for a [job](#) if this [quotation](#) is converted to a [job](#).

Functions**Text**

Use this to display [job](#) story text associated with the [job line](#).

Select **Previous (F12)** to return to the [Quotation](#) Enquiry List window.

Quotation Enquiry Expenses Window

To display this window, enter 6 against a [quotation](#) on the [Quotation](#) Enquiry List window.

This window lists each [expense type](#) defined for the [quotation](#). For each [expense type](#), the [cost](#), mark-up and price are displayed.

Options**Transactions**

Use this to display the [Quotation](#) Enquiry Transactions window.

Functions**Position List (F17)**

Use this to position the cursor on the transaction that most closely matches the data entered.

Select Transactions against an [expense type](#) to display the [Quotation](#) Enquiry Transactions window.

Alternatively, select **Previous (F12)** to return to the [Quotation](#) List Enquiry window.

Quotation Enquiry Transactions Window

To display this window, select Transactions against an [expense type](#) on the [Quotation](#) Enquiry Expenses window.

This window lists all the transactions for the selected [expense type](#) and displays the total, [cost](#) and price. The actual information displayed for each transaction depends upon the [transaction type](#).

Fields

Option

Select **Display** to display the transaction details. The window displayed depends upon the type of transaction. For more details on each transaction window, refer to the Maintain Quote section in the [Quotations](#) chapter of this product guide.

Functions

Position List (F17)

Use this to position the cursor on the transaction that most closely matches the data entered.

Select **Previous (F12)** to return to the [Quotation](#) Enquiry Expenses window.

Quotation Enquiry Subcontract Pop-up

To display this pop-up, select Subcontract against a [quotation](#) on the [Quotation](#) Enquiry List window.

This subcontract information is used as part of the [quotation](#) price calculation and will also be used as the basis of the required purchase order details for a [job](#) if this [quotation](#) is converted to a [job](#).

Fields

Supplier Number

This field displays the supplier account number.

Fiscal Type

This is only displayed if either the tax engine (Brazil/India), Argentina, Colombia, Mexico or Peru function is active.

Enter the fiscal type to be used; it is mandatory if displayed.

The application [task](#) is used to access the S21 [Task](#)/ Document type table (4/L1M) and if a single record is found then the Fiscal Document Type is displayed and protected.

If more than one record is found and, if one is flagged as the default, then it will be returned and displayed but the field will not be protected.

If more than one record is found then the field will be left as blank

If applicable, a prompt is available over the list of Fiscal Document Types for the Usage type

Supplier Address

This field displays the supplier address sequence.

S/C Reference

This field displays the subcontract reference.

Receiving address

India only

This displays the receiving address used for purchase orders created

Quantity

This field displays the quantity of the non-stock items required.

Cost

This field displays the [cost](#) agreed with the supplier.

Mark Up %

This field displays the mark up percentage that will be applied to the [cost](#) to give the charge that will be made to the end customer.

Note: *Although a charge value is displayed, it will only be invoiced to the end customer if the [cover type/job category](#) charge matrix indicates that expenses are chargeable.*

Charge

This field displays the charge that will be invoiced to the end customer if the [job line](#) is chargeable.

Currency Code

This field displays the currency of the supplier code/address entered.

VAT Code

This field displays the VAT code required for this subcontract service. This must be a valid VAT code.

Purchasing Officer

This field displays the purchasing officer who will be responsible for the management of this purchase order within the Purchase Management system.

Purchase Order

This field displays the number of the purchase order raised to satisfy this subcontract [job line](#).

Functions**Text (F14)**

Use this to display [job](#) story text associated with the [job line](#).

Select **Previous (F12)** to return to the [Quotation](#) Enquiry List window.

Chapter 17 Advanced Mobile Service

Pick List Maintenance [1/EQMS]

Use this [task](#) to define and maintain the picklists that will be used by the client application.

The application is installed with definitions of all the required picklist types, and some demonstration data which you can use for initial testing. However you should enter proper values for each type before implementing mService fully.

For picklist types whose values correspond to Equipment Servicing codes, you should maintain these values in line with the equivalent Equipment Servicing codes, so that the technician has access to up-to-date information, and incoming transactions do not fail validation.

Picklist types are divided into 2 categories. These are:

- System-defined types. These are required for the system to operate correctly. They are listed below.
- User-defined types. These are used by the audit check functionality within mService. Any number of picklist types can be defined to hold lists of responses to various checks / questions. These can then be defined against audit checks as the response picklist type. An example is given below.

System defined pick list types

CCAT - Audit check category

Use this picklist type to define categories for audit checks, in a hierarchical or simple flat structure as required.

There is one additional attribute required for this type:

Flag 1:

This is an optional attribute, used to define whether or not a category must be completed before proceeding on to the next mService screen.

Values:

- 0 or blank - This category does not require completion

- 1 - All mandatory checks in this category must be completed before proceeding to the next screen.

CLSC - Closure code

Use this picklist type to define [call](#) closure codes.

There is one additional attribute required for this type:

Flag 1:

This is an optional attribute, used to control the behaviour of the client application during booking completion.

Values:

- 0 or blank - [Task](#) not yet complete; will be left on the unit
- 1 - [Task](#) is complete; all details will be removed from the unit once booking details have been received by the server.
- 2 - [Call](#) is complete; additional validation will be performed to ensure that all required steps have been performed for the [call](#); if so, it will be removed from the unit once booking details have been received by the server.

The return code for selectable items must be set to a valid Equipment Servicing completion code (maintained via **Maintain Codes/Parameters [3/EQU]**, parameter type COMP).

User defined pick list types

These are currently only used to define audit check response lists.

Response list types

The following examples are provided for the demonstration [company](#) Z1:

- RS01 – Yes / No
- RS02 – Done / Not done
- RS03 – Good / Satisfactory / Poor
- RS04 – Yes / No / Not applicable
- RS05 – Done / Not done / Not applicable

There is one additional attribute required for these types:

Flag 1:

This is an optional attribute, used to specify whether a comment is required for a particular response. For example, comments may be required where the technician records a 'Not done', or a 'Poor' response.

Values:

- 0 or blank – Comment not required
- 1 – Comment is required

Pick List Maintenance Window

To display this window, select the Pick List Maintenance [task](#).

There are two main functions you can perform from this window:

- You can take the option to maintain pick list types themselves
- You can select an existing pick list type to amend its values
OR
- You can enter an existing pick list type (and optionally parent ID) to amend its values

Fields

Pick list type

If you want to amend values for a particular type, enter the type here and press Enter. The Pick List Values Selection window will be displayed.

Parent ID

If you want to amend values for a particular type and parent (when the values are in a hierarchy, enter both the type and parent ID and press Enter. The Pick List Values Selection window will be displayed.

Options

Select

Select a pick list type to maintain pick list values for this type. The Pick list Values Selection window is displayed.

Functions

Maintain types (F16)

Select this option to maintain pick list type definitions. The Pick List Types Selection window will be displayed.

Select a pick list type to maintain pick list values for this type. The Pick List Values Selection window will be displayed.

Pick List Values Selection Window

Select a pick list type on the Pick List Maintenance Selection window to display the Pick List Values Selection window.

Use this window to set up or amend pick list values. The window lists all pick list values already set up for the selected type and parent.

Options

Change

Select Change to amend a particular pick list value. The Pick List Value Maintenance window will be displayed.

Children

Select Children to display child pick list values These will be displayed in another Pick List Values Selection window.

Functions

Add (F10)

Select this function to add a new pick list ID for this type. The Pick List Value Maintenance window will be displayed.

Select the **Add (F10)** function to add a new pick list ID for this type. The Pick list Value Maintenance window will be displayed.

Pick List Value Maintenance Window

Select a picklist value on the Picklist Values Maintenance Selection window to display the Picklist Value Maintenance window.

Fields

ID

This field will be maintainable for new values only. Enter a number between 1 and 99999 to define this value. The number must be unique within this picklist type.

Description

Enter a description of this picklist value.

Return code

If you wish to define a hierarchy, then leave this code blank. You will then be able to add child values by selecting Children from the Picklist Values Selection window.

If this picklist value is at the bottom of a hierarchy, then you should enter a value into the Return code. For most picklist types, this value must correspond to a particular Equipment Servicing code, such as completion code, [status code](#) etc. This is explained in the earlier section: **Error!**

Reference source not found..

Attributes

There are up to:

- 2 flag attributes
- 2 17 alpha character attributes
- 2 integer attributes
- 2 decimal attributes

which may be required, depending on the definition of the picklist type.

The definition also specifies whether the additional attributes are optional or mandatory. Validation will ensure that you enter these attributes if required.

Functions

Update (F8)

Select this option to update the database with changes, and to generate a change transaction to send out to mService clients.

Delete (F11)

Select this option to delete the currently displayed value, and to generate a delete transaction to send out to mService clients.

Pick List Types Selection Window

Select the function to maintain types from the Picklist Maintenance Selection window to display the Picklist Types Selection window.

Use this window to select a Pick List type for maintenance

Fields

Picklist type

If you want to amend the definition for a particular type, enter the type here and press Enter. The Picklist Type Maintenance window will be displayed.

Options

Select

Select a picklist type to maintain its definition. The Picklist Type Maintenance window will be displayed.

Select a type or **Add (F10)** to continue to the Pick list Types Maintenance window.

Pick List Types Maintenance Window

Select a picklist type on the Picklist Types Selection window to display the Picklist Type Maintenance window.

Use this window to select a Pick List type for maintenance

Fields

ID

This field will be maintainable for new values only. Enter a number between 1 and 99999 to define this value. The number must be unique within this picklist type.

Description

Enter a description for this picklist type.

Attributes

For each attribute that may be required for this picklist type:

- Enter a short description of what the attribute will be used for. This will be displayed in the Picklist Value Maintenance window, to prompt the user to enter an attribute value.

- Specify whether each attribute will be:

- Not used (0)
- Optional (1)
- Required (2)

Functions

Update (F8)

Select this option to update the database with changes.

Delete (F11)

Select this option to delete the currently displayed type.

Check List Maintenance [2/EQMS]

Use this [task](#) to maintain definitions of the various questions / checks that a technician may be required to perform.

The actual list of checks to be performed for a particular type of [call](#) is defined via a separate option – see Equipment Checklist Maintenance below.

Checks may be defined with different response types, as follows:

- Text - The technician must enter a textual response
- Value - The technician must enter a value

- Option - The technician must select an option from a set of options. The list of options is defined in a picklist.
- List - The technician must select a value from a list of possible values. The list of values is defined in a picklist.

Check Definition Maintenance Selection Window

To display this window, select the Checklist Maintenance [task](#).

From this window you can select a check to amend, either by selecting it from the list, or entering the code directly.

Fields

Check code

If you know the code of the definition you want to amend, enter it here and press Enter. The Check Definition Maintenance window will be displayed.

Options

Change

Select Change to amend a particular check definition. The Check Definition Maintenance window will be displayed.

Functions

Add (F10)

Select this function to add a new check definition. The Check Definition Maintenance window will be displayed.

Select the code of the definition you want to amend, enter it here and press Enter. The Check Definition Maintenance window will be displayed

Check Definition Maintenance Window

Select a code on the Check Definition Maintenance Selection window to display the Check Definition Maintenance window.

Use this window to maintain a particular check definition.

Fields

Check code

This field will be maintainable for new values only. Enter a unique code using any combination of alpha and numeric characters.

Description

Enter a description of this check definition. This is the description that will be displayed in the Audit check window in the mService client application.

If you have clients running on a small screen device such as a PDA, it is recommended that you keep this description short, and add further explanatory notes as help text if required.

Response required

Select one of the following:

- Optional (0) – if the technician does not have to enter a response for this type of check
- Mandatory (1) – if the technician must enter a response for this type of check

Response type

Specify the type of response required for this check. Select one of the following:

- Text (1) – The technician must enter some text
- Value (2) – The technician must enter a numeric value
- Option list (3) – The technician must select from a number of options
- Picklist (4) – The technician must selected from a drop down list of options

If you have clients running on a small screen device such as a PDA, it is recommended that you use the 'Option' type only where there are 2, or maybe 3 options, and keep the option descriptions as short as possible.

Minimum value

For value type responses only, specify the range of values that can be entered. If both minimum and maximum values are left as zero, then no range validation will be performed.

Maximum value

For value type responses only, specify the range of values that can be entered. If both minimum and maximum values are left as zero, then no range validation will be performed.

Picklist type

For option and picklist type responses, specify the picklist type that will hold the possible responses. Enter the type directly if known, or use the prompt facility to select a valid type.

Help text

Enter any further details for the check. The technician will be able to view these details upon request within the mService client application.

Functions**Update (F8)**

Select this option to update the database with changes, and to generate a change transaction to send out to mService clients.

Delete (F11)

Select this option to delete the currently displayed value, and to generate a delete transaction to send out to mService clients.

Select **Update (F8)** to return to the Check Definitions maintenance selection window

Equipment Check List Maintenance [3/EQMS]

Use this [task](#) to maintain the lists of checks required for a particular piece of equipment and type of [job](#).

As well as being defined against an equipment / [job](#) type combination, checks must be associated with an audit category. Audit categories are the mechanism for organising checks so that related checks are grouped together. This mechanism also allows the same check to be performed in more than one context, if required.

Audit categories must have been previously set up in the picklist type 'CCAT'.

Equipment Checklist Maintenance Selection Window

To display this window, select the Equipment Checklist Maintenance [task](#)

Use this window to specify the equipment / [job](#) type combination for which you want to define a checklist.

Equipment can be defined by specifying:

- 1. [Model division](#), group, sub-group and number OR
- 2. [Model division](#), group and sub-group OR
- 3. [Model division](#) and group OR
- 4. [Model division](#)

The type of [job](#) can be defined by specifying:

- A. Specific [job category](#), procedure, [sub-job](#) and [task](#) OR
- B. Specific [job category](#) and procedure, [sub-job](#), all [tasks](#) OR
- C. Specific [job category](#) and procedure, all [sub-jobs](#) and all [tasks](#)
- D. Specific [job category](#), all procedures all [sub-jobs](#) and all [tasks](#) OR
- E. All [job](#) categories, specific [sub-job](#) and [task](#) OR
- F. All [job](#) categories, specific [sub-job](#), all [tasks](#) OR
- G. All [job](#) categories, all [sub-jobs](#) and [tasks](#)

When determining the checks to be completed for a particular [job](#), these are searched for in the following sequence:

1A, 1B, 1C, 1D, 1E, 1F, 1G, 2A, 2B, 2C, 2D, 2E, 2F,2G, 3A, 3B, 3C, 3D, 3E, 3F,3G, 4A, 4B, 4C, 4D, 4E, 4F, 4G

As soon as some checks are found at a particular level, these checks are attached to the [job](#) and the search ends.

Fields

Division

Enter the [model division](#) for which you wish to specify checks.

Alternatively, use the prompt facility to display all [divisions](#).

If you are specifying [model](#) number, you may leave this field blank as it will be retrieved from the [model](#) definition itself.

Model group

Enter the [model](#) group for which you wish to specify checks, or leave blank to represent all.

Alternatively, use the prompt facility to display all [model](#) groups.

If you are specifying [model](#) number, you may leave this field blank as it will be retrieved from the [model](#) definition itself.

Model sub-group

Enter the [model](#) sub-group for which you wish to specify checks, or leave blank to represent all.

Alternatively, use the prompt facility to display all [model](#) sub-groups.

If you are specifying [model](#) number, you may leave this field blank as it will be retrieved from the [model](#) definition itself.

Model number

Enter the [model](#) number for which you wish to specify checks, or leave to represent all.

Alternatively, use the prompt facility to display all [model](#) numbers.

Job category / All checkbox

Enter the [job category](#) for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1).

Alternatively, use the prompt facility to display all [job](#) categories.

Procedure / All checkbox

Enter the procedure code for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1) to indicate all procedures.

Alternatively, use the prompt facility to display all procedures.

Sub-job / All checkbox

Enter the [sub-job](#) for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1) to indicate all [sub-jobs](#).

Alternatively, use the prompt facility to display all [sub-jobs](#) if you have defined specific [sub-job](#) codes in the EQ codes file in Code type SJBN.

Task number / All checkbox

Enter the [task](#) number for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1) to indicate all [tasks](#).

Alternatively, use the prompt facility to display all [task](#) numbers if you have defined specific [sub-job](#) codes in the EQ codes file in Code type SJBN.

Press Enter to continue to the Equipment Checklist Category Selection Window.

Equipment Checklist Category Selection Window

Enter equipment and [job](#) type identifiers in the Equipment Checklist Maintenance Selection window to display the Equipment Checklist Category Selection window.

This window allows you to select the categories to which you want to add checks. Drill down into the category hierarchy until you reach the leaf node (lowest level category) for which you want to add checks.

Options

Drill down

Select Drill down to display the next level in the category hierarchy. If a category has children, then these will be displayed in a similar Category Selection window. If it has no children, then the Equipment Checklist Maintenance window will be displayed.

Equipment Checklist Maintenance Window

Drill down through the Equipment Checklist Category to display the Equipment Checklist Maintenance window

Use this window to create lists of checks to be performed for a particular equipment / [job](#) type / category combination. The window lists all checks already included for the selected combination.

Fields

Seq (Sequence)

Each check has a sequence number. This controls the order in which the checks are listed here, but more importantly, the order in which they are displayed within the mService client application.

For ease of entry, the sequence numbers are pre-filled in steps of 10, but may be changed to insert new checks between existing ones or to re-order checks.

Code / Description

Enter a valid check code. The description will be retrieved and displayed for confirmation.

Functions

Re-sequence (F5)

Select this function to re-number the checks in steps of 10.

Update (F8)

Select this option to update the database with changes.

Health & Safety Check List Maintenance [4/EQMS]

Use this [task](#) to maintain the lists of Health & Safety checks required for a particular piece of equipment and type of [job](#).

As well as being defined against an equipment / [job](#) type combination, Health & Safety checks must be associated with an audit category. Audit categories are the mechanism for organising checks so that related checks are grouped together. This mechanism also allows the same check to be performed in more than one context, if required.

Audit categories must have been previously set up in the picklist type 'HESA'.

Health & Safety Checklist Maintenance Selection Window

To display this window, select the Health & Safety Checklist Maintenance [task](#)

Use this window to specify the equipment / [job](#) type combination for which you want to define a Health & safety checklist.

Equipment can be defined by specifying:

- 1. [Model division](#), group, sub-group and number OR
- 2. [Model division](#), group and sub-group OR
- 3. [Model division](#) and group OR
- 4. [Model division](#)

The type of [job](#) can be defined by specifying:

- A. Specific [job category](#), procedure, [sub-job](#) and [task](#) OR
- B. Specific [job category](#) and procedure, [sub-job](#), all [tasks](#) OR
- C. Specific [job category](#) and procedure, all [sub-jobs](#) and all [tasks](#)
- D. Specific [job category](#), all procedures all [sub-jobs](#) and all [tasks](#) OR
- E. All [job](#) categories, specific [sub-job](#) and [task](#) OR
- F. All [job](#) categories, specific [sub-job](#), all [tasks](#) OR
- G. All [job](#) categories, all [sub-jobs](#) and [tasks](#)

When determining the checks to be completed for a particular [job](#), these are searched for in the following sequence:

1A, 1B, 1C, 1D, 1E, 1F, 1G, 2A, 2B, 2C, 2D, 2E, 2F,2G, 3A, 3B, 3C, 3D, 3E, 3F,3G, 4A, 4B, 4C, 4D, 4E, 4F, 4G

As soon as some checks are found at a particular level, these checks are attached to the [job](#) and the search ends.

Fields

Division

Enter the [model division](#) for which you wish to specify checks. If you are specifying [model](#) number, you may leave this field blank as it will be retrieved from the [model](#) definition itself.

Alternatively, use the prompt facility to display all [divisions](#).

Model group

Enter the [model](#) group for which you wish to specify checks, or leave blank to represent all. If you are specifying [model](#) number, you may leave this field blank as it will be retrieved from the [model](#) definition itself.

Alternatively, use the prompt facility to display all [model](#) groups.

Model sub-group

Enter the [model](#) sub-group for which you wish to specify checks, or leave blank to represent all. If you are specifying [model](#) number, you may leave this field blank as it will be retrieved from the [model](#) definition itself.

Alternatively, use the prompt facility to display all [model](#) sub-groups.

Model number

Enter the [model](#) number for which you wish to specify checks, or leave to represent all.

Alternatively, use the prompt facility to display all [model](#) numbers.

Job category / All checkbox

Enter the [job category](#) for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1).

Alternatively, use the prompt facility to display all [job](#) categories.

Procedure / All checkbox

Enter the procedure code for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1) to indicate all procedures.

Alternatively, use the prompt facility to display all procedures.

Sub-job / All checkbox

Enter the [sub-job](#) for which you wish to specify checks, or leave blank and set the All checkbox to **Checked** (1) to indicate all [sub-jobs](#).

Alternatively, use the prompt facility to display all [sub-jobs](#) if you have defined specific [sub-job](#) codes in the EQ codes file in Code type SJBN.

Task number / All checkbox

Enter the [task](#) number for which you wish to specify checks, or leave blank and set the All checkbox to Checked (1) to indicate all [tasks](#).

Alternatively, use the prompt facility to display all [task](#) numbers if you have defined specific [sub-job](#) codes in the EQ codes file in Code type SJBN.

Press Enter to continue to the Health & Safety Checklist Category Selection Window.

Health & Safety Checklist Category Selection Window

Enter equipment and [job](#) type identifiers in the Health & Safety Checklist Maintenance Selection window to display the Health & Safety Checklist Category Selection window.

This window allows you to select the categories to which you want to add checks. Drill down into the category hierarchy until you reach the leaf node (lowest level category) for which you want to add checks.

Options

Drill down

Select Drill down to display the next level in the category hierarchy. If a category has children, then these will be displayed in a similar Category Selection window. If it has no children, then the Health & Safety Checklist Maintenance window will be displayed.

Health & Safety Checklist Maintenance Window

Drill down through the Health & Safety Checklist Category to display the Health & Safety Checklist Maintenance window

Use this window to create lists of checks to be performed for a particular equipment / [job](#) type / category combination. The window lists all checks already included for the selected combination.

Fields

Seq (Sequence)

Each check has a sequence number. This controls the order in which the checks are listed here, but more importantly, the order in which they are displayed within the mService client application.

For ease of entry, the sequence numbers are pre-filled in steps of 10, but may be changed to insert new checks between existing ones or to re-order checks.

Code / Description

Enter a valid check code. The description will be retrieved and displayed for confirmation.

Functions**Re-sequence (F5)**

Select this function to re-number the checks in steps of 10.

Update (F8)

Select this option to update the database with changes.

Select **Update (F8)** to save the changes made.

Technician mService Details Maintenance [1/EQM]

mService related fields are held on the additional details window in Technician maintenance.

Technician mService Details Window

Select Additional Details from the main Technician Maintenance window to display the Technician mService Details window

Use this window to view and maintain mService specific attributes of the technician.

Fields**Client MQe Queue Manager**

This field is not currently in use.

Server MQe Queue Manager

This field is not currently in use.

Host for MQe Server Queue Manager

This field is not currently in use.

Cient/Server wait time

This field is not currently in use.

Secure Panels password

This field is not currently in use.

Application

This field indicates the client application which the technician has installed. It will be set to 'M' for mService.

Version installed

This field is not currently in use.

Fix level

This field is not currently in use.

Date last update

This field is not currently in use.

Time last update

This field is not currently in use.

GPRS network

This field is not currently in use.

Confirmation required

Use this checkbox to indicate if the technician has been activated in Advance Mobile.

Engineer active

Use this checkbox to indicate whether not the technician is currently processing [calls](#) using mService, as follows:

Unchecked – The technician is not currently processing [calls](#) via mService.

Checked – The technician is currently processing [calls](#) via mService. Details of new and amended [calls](#) will be sent to the engineer via mService

Select **Update (F8)** to update the details.

Equipment Service Utilities [16/EQU]

mService includes a batch connector load up function. You can use this to trigger all records from a particular table in add mode. You can use this to populate the Advanced Mobile application with codes from System21.

Connector Initial Load

Select the Equipment Service Utilities [task](#) to display this window

Use this [task](#) to trigger an entire table and run the correct document type.

All of the available document types are listed on the panel.

Outbound Monitor [10/L1S & 20/L1S]

mService includes a background [job](#) – the Outbound [Call](#) Monitor – which must be configured and running in order to send [call](#) transactions out to technicians.

The [installation](#) of mService will configure this background [job](#) to run under standard Aurora subsystem control. It will create subsystem control entries according to parameters specified during the install.

Subsystem Set Up

After [installation](#) of mService, you should check that the subsystem control entries have been created, and that you can start the subsystem and background [job](#).

You may wish to add the start-up to the Auto Day Start procedures within Machine [Manager](#).

Chapter 18 Utilities

Copy Company [1/EQU]

Use this [task](#) to create a new [company](#) by copying data from an existing [company](#).

You can make any changes in the new [company](#) (for example, [company](#) name) using the Application [Manager](#) maintenance [tasks](#). You must extend user profiles to include the new [company](#) code.

Note: *You must have exclusive use of Equipment Servicing to do this.*

You have to specify the amount of data you want to copy. Level 1 copies the minimum; level 4 copies the maximum amount.

The software copies the following database files for each level:

Level 1 copies:

Base level files such as [Company](#), Calendars, [Job](#) Categories, [Contract Types](#), Codes files etc.

Level 2 copies all the Level 1 files, plus:

Coding structures such as [Model](#) file, Technicians Fault Reporting Hierarchies etc.

Level 3 copies all the Level 1 and 2 files, plus:

Customer Additional Details, [Installations](#) , [Contracts](#) etc.

Level 4 copies ALL the EQP files, that is, all the above files plus [jobs](#), technical reports, invoices, etc.

Note: *This utility does not copy customer records (SLP05). Use the Copy [Company](#) utility in [Accounts Receivable](#) to do this.*

Note: *If you interface to Inventory and [Sales Order Processing](#), you must use the Inventory [task](#) to copy the technician stockrooms and the stockroom balances and the [Sales Order Processing](#) utility to copy the parts price and discount lists.*

Copy Company Utility Window

To display this window, select the Copy [Company](#) [task](#).

Use this window to select the [company](#) and level of information to copy.

Fields

Copy from Company

Enter an existing [company](#). This defaults to the current [company](#).

To Company

Enter the [company](#) to create. This [company](#) must not already exist.

Copy Detail Level

Enter one of the following to indicate the level of information to copy:

1 - To copy base data only

This is the [company](#) profile, calendar, [job](#) categories, price lists, and [contract types](#).

2 - To copy second level data

This is base data plus technicians, [models](#), territories and technician assignments.

3 - To copy third level data

This is base data and second level data plus [installations](#), [contracts](#) and customer additional service details.

4 - To copy fourth level data

This copies all data in the [company](#); including transaction data such as [jobs](#), technical reports and invoices.

Max. No. of Records

Enter the maximum records to copy. This must be greater than zero.

Select **Submit [Job](#) (F8)** to copy the [company](#).

Delete Company [2/EQU]

Use this [task](#) to delete all the Equipment Servicing data associated with a [company](#).

Before you can run this [task](#), you must end all the subsystems for Equipment Servicing.

Note: *You must have exclusive use of Equipment Servicing to do this.*

Note: *Once you have submitted the [job](#), you must exit Equipment Servicing.*

Delete Company Utility Window

To display this window, select the Delete [Company task](#).

Use this window to select the [company](#) for which you want to delete Equipment Servicing details.

Fields

Files Library

Enter the current files library.

Company Code

Enter the current [company](#).

Select **Submit Job (F8)** to delete the [company](#).

Codes/Parameters file Maintenance [2/EQP, 3/EQU]

There are two versions of this [task](#) for setting up the many codes that are used throughout the software for data entry, validation and analysis:

The two [tasks](#) lead into exactly the same windows, and you use them in the same way. The difference between them is that the system utilities [task](#) displays, and allows you to maintain, the system-supplied parameters. These are supplied with Equipment Servicing when it is installed, and they are essential to its operation.

You can identify system-supplied parameter types by the asterisk (*) in the first position of the parameter type description.

You are strongly advised not to amend or delete system-supplied parameter types, their descriptions or their parameter IDs. You can amend the parameter ID descriptions if the amendment is advised or approved by your software support organisation.

Caution: You should only use this task in special circumstances, and then only under the guidance of an experienced technical adviser on Equipment Servicing. The corruption of reserved codes would cause severe problems. For this reason, access to the task must be restricted to the most senior person(s) responsible for data integrity.

Note: *You must have exclusive use of Equipment Servicing to do this.*

You can change a user code into a system-supplied code by adding an asterisk (*) to the beginning of the description. It will then only appear in the system utilities version of the [task](#).

List of Parameter Types

There are two types of codes: reserved codes, required by the software, and codes you can use and define. You can create additional parameters to control processing. For example, the Field to be Mandatory field is specific to parameter type VLDN and determines whether you must enter the technician and the fault code when you log a [call](#).

The parameter types available and where you use them are as follows:

ABSC

Technician Absent Codes

Code ID - one character

You must have 1 (Logged on) and 0 (Logged off). You can define other reasons for a technician's absence, for example, holiday or sickness.

ACTY

[Activity](#) Codes

Code ID - two numeric characters

You can define activities that can be attached to a staged payment schedule for a [job](#).

AWCD

Allowance Code

Code ID - two numeric characters

You can define allowances that can be attached to technician time sheets. This field is memo only on the [timesheet](#) function.

BUDF

[Budget](#) Forecast Code

Code ID - two numeric characters

You can define codes that will allow you to define different forecasts at the same [job](#) level for comparison.

BUDC

[Budget](#) Code

Code ID - two numeric characters

You can define codes that will allow you to define different [budgets](#) at the same [job](#) level for comparison.

CCAL

Customer Calendar Codes

Code ID - two characters

You can define alternative calendars that will be used by Equipment Servicing when calculating target date and times for [jobs](#). The [company](#) default calendar has a blank calendar code. If you create additional calendars, these can then be attached to customer, equipment or [contracts](#).

CCRC

[Contract](#) Cancellation Reason

Code ID - one character

You can define the reasons for cancelling a [contract](#), for example, too expensive.

CHST

* [Contract](#) Header Status

Code ID - one character

This defines the possible status of a [contract](#) header, for example, [quotation](#), active.

CLMT

Warranty Claim Type

Code ID - one character

This defines the warranty type, for example, labour, parts.

CLST

[Contract](#) Line Status

Code ID - one character

This defines the status of a [contract](#) line, for example, active, expired.

CODC

Condition Code (Accessories)

Code ID - one character

This defines the condition code for accessories. You should only use this on the accessory.

COLM

Collection Method

Code ID - two characters

This field is used by the system to define the way in which the equipment is to be transported to the workshop.

01 - Customer to transport equipment

02 - Workshop to collect equipment

These values should not be deleted.

CORA

[Model](#) Reporting Level 4

Code ID - three characters

You can define the codes that can be attached to the fourth level of the [model](#)/reporting hierarchy.

COST

[Cost](#) to Complete Code

Code ID - two characters

If you want to include a [job](#) in the [cost](#) to complete process, you must define a [cost](#) to complete code against it. This [job](#) is then included in the Initiate [Cost](#) to Complete [task's](#) batch [job](#).

If you have a large number of [jobs](#) to process in the Initiate [Cost](#) to Complete [task](#), this batch [job](#) could be a big [job](#). To split the processing into two, three or more batches, set up two, three or more

[cost](#) to complete codes, and assign different ones to different [jobs](#). You can process only those [jobs](#) of a certain code.

CRDR

Credit Assessment Reason Code

Code ID - two characters

This defines the credit assessment, for example, credit not available, credit required. These are used by the system and should not be deleted.

CREA

[Call](#) Cancellation Reason

Code ID - two characters

You can define codes to identify reasons why you can cancel a logged [call](#), for example, customer cancelled, not covered by [contract](#).

CRTY

Credit Type

Code ID - one character

This defines the credit type, for example, credit not applicable, credit required.

CSHF

Shift Profile Code

Code ID - two characters

Use this to define different types of shift profile codes. These can be attached to working day type to identify the shifts working on that type of day. The code is then included in the target date and time calculation.

DAYS

*Day Name

Code ID - three characters

This defines a short description for days. It is used in the time allocation function.

DAYT

*Day Type

Code ID - one character

This defines the type of day, for example, working, non-working or bank holiday.

This is an important parameter when dates and times are being calculated. An additional flag on the parameter indicates whether the day type is a working or a non-working day. Non-working days are not included in date calculations.

There is also a deferred revenue check box. If this box is **checked**, [contract](#) revenue for a given [invoice period](#) will be divided up and deferred over the number of deferral days in the [invoice period](#).

DEFC

Defect Code

Code ID - one character

This defines the problem found with parts that have to be replaced during a repair, for example, loose wire, broken PCB.

DESM

Despatch Methods

Code ID - one character

This defines how you return the equipment to the customer, for example, courier, customer collected.

DFDM

Default Despatch Methods

Code ID - one character

This defines the default despatch method, for example, courier.

DISC

Discount Reasons

Code ID - one character

This defines the reasons for a discount, for example, major account, no discount.

EDAY

Elapsed Days

Code ID - four characters

This defines elapsed days for a document before the system recommends follow up action, for example, warranty claim returns, letter or quote chasing days.

EGRD

Technician [Job](#) Grades

Code ID - two characters

This defines the technician grades, for example, senior technician, field technician. Technician grades can then, if required, be used to attach different [cost](#) and labour price lists to a [job](#). This field is used in the **Maintain Technician [task](#) [1/EQM]**.

EQST

Equipment Status

Code ID - one character

This defines the status of the equipment. This status is user-definable and is usually used to indicate loan, customer or demo equipment at the customer [site](#) using the **Maintain [Installation Details](#) [task](#) [3/EQE]**.

ETAR

*Engr Assignment Error Codes

Code ID - two characters

This defines the error codes for automatic [call](#) assignment and the Resource Planner Board, for example, ACA not allowed for [company](#), unable to place [call](#) in queue.

FLTC

Faults

Code ID - three characters

This defines the codes that can be attached to the first level of the reporting hierarchy using the Maintain Reporting Hierarchy [task](#).

GLPR

Global Price Increase Code

Code ID - two character

This defines the groups that could be used to implement a [contract](#) price increase, for example, dealer groups code, no price increase.

GLT

*GL Deferred Revenue Transaction Text

Code ID - one character

This defines the text transferred to [General Ledger](#) with the [contract](#) deferred revenue, for example, [service contract](#) number, service deferral.

GTXT

*General System Text

This is used in [contract](#) maintenance to change the description of the F22 function depending on the status of the [contract](#):

AC - **Accept [Contract](#) (F22)**

QU - **[Quotation](#) Only (F22)**

INVT

Settlement Discount Invoice Type

Code ID - one character

This defines the type of invoice appropriate for settlement discount, for example, [job](#) invoice, [contract](#) invoice.

JHST

***[Job](#) Header Status**

Code ID - one character

This defines the status of the [job](#) header, for example, open, cancelled.

JLAB***[Job Line](#) Abbreviated Status**

Code ID - two characters

This defines the abbreviations for the [job line](#) status, for example, OPN, SCH, [WIP](#). This 3-letter abbreviation is visible in the **Work Control [task](#) [3/EQS]**.

JLST***[Job Line](#) Status**

Code ID - two characters

This defines the [job line](#) statuses, for example, 01 (customer to send equipment), 20 (open), 50 (complete) etc.

There are a number of additional control flags associated with this value:

Escalation Active

If this flag is **1**, this status will be included in the Escalation Reporting system if you use it.

Whole [Job](#) Status

If this field is blank, the status can be applied at individual line level. For example assignment (22) and scheduling (24) are usually applied at line level.

If the field is not blank, this status can only apply to the whole [job](#). For example Customer to Send (01) and Factory Claim Required (86) apply to the whole [job](#).

MROV

Reason for Override

Code ID - two characters

This defines the reason for a meter reading override, for example, meter change, previous actual incorrect.

MRSR

Meter Reading Source

Code ID - one character

This defines the methods used for getting the meter reading, for example, customer reading, technician reading.

MTHS

*Months Descriptions

Code ID - three characters

This defines the monthly descriptions used in various windows.

OPER

Physical Condition Code

Code ID - two characters

This defines the physical condition of the equipment, for example, scratched. It is input capable during equipment booking for workshop [jobs](#).

OWNP

Warranty Claim [Ownership](#) Code

Code ID - one character

This defines the warranty claim [ownership](#), for example, end customer. This is used during warranty claim creation.

PAYT

Payment [Terms](#)

Code ID - one character

This defines the payment [terms](#): for example, Payment Method No. 1. This function is not used in this release of the application.

PTCH

Geocode/Territory/Patch Description

Code ID - three characters

This defines the Geocode/Territory/Patch, for example, all territories for team *DF. This field is used in the Maintain FSG/Territory/Team [task](#).

REAS

Req Date Change Reason Code

Code ID - two characters

This defines the date change reason, for example, date input mistake. This is primarily used by the fixed asset processing.

RECT

*Invoice Line Type

Code ID - two characters

This defines the type of lines being processed through [job](#) completion, pending invoice maintenance, invoicing and invoice enquiry, for example, fixed labour hours, parts.

REC2

*Invoice Line Type Short Description

Code ID - two characters

This defines the abbreviations for the invoice line types defined by parameter RECT, for example, FXD LBR, LBR HRS.

REGN

Regions

Code ID - two characters

This defines the regions for the workshop [branch](#), for example, Central, Southern. Other [tasks](#) that can have regions entered are Maintain Technician, Maintain [Contracts](#) and Maintain Additional Customer Details.

REPC

Repair Code

Code ID - one character

This defines the repair codes for parts used on a [job](#), for example, Replacement, Cleaned. These codes are normally entered in conjunction with a defect code.

RJCD

Warranty Claims Reject Code

Code ID - one character

This defines the reject reasons for warranty claims, for example, Invalid Account, Invalid [Location](#). At any point in the life of a claim it can be re validated and any faults found with the claim recorded as a series of reject codes.

Each code has additional flags associated with it that control whether the reject code can be manually overridden during warranty claim management.

RRES

Credit Release Reason

Code ID - one character

This defines the reasons for releasing the credit, for example, Payment Agreed, Life-threatening Problem. This code is mandatory when you are using the Maintain Credit [Calls task](#).

RVTY

Default Return [Visits](#)

Code ID - two characters

This defines the reason for return [visits](#). These codes can be recorded in the [timesheet](#) system. Examples of reason for return are: parts required, [job](#) not complete, customer [terminated visit](#).

SECT

Customer Description

Code ID - three characters

This defines the codes that can be attached to the second level of the reporting hierarchy using the **Maintain Reporting Hierarchy [2/EQM]** [task](#).

SJBN

Sub [Job](#) Codes

Code ID - three characters

If any values are set up, these will be the only codes allowed to be entered in a template structure and in [job](#) structure. If you do not set up any codes, you can enter any code when creating structures.

SRVC

*Special Revenue Categories

*SC - Sundry Credits

*SI - Sundry Invoices

SSCT

Customer Description

Code ID - three characters

This defines the codes that can be attached to the third level of the reporting hierarchy using the **Maintain Reporting Hierarchy** [task](#).

STA1

Statistical Family ([Models](#))

Code ID - three characters

This defines the statistical groups for the [models](#), for example, Imperial Measurement, Metric Measurement. If required, this code is attached via the **Maintain Model** [task](#) [2/EQE]. This can be used as a further non-hierarchical definition of the [model](#) (in addition to [division](#), [model](#) group, and [model](#) sub group).

S2SE

*Serious Error Codes

The only one defined is 01 (End of Calendar File Reached). This is printed out on the Serious Error report which can be run from the Report by Serious Errors [task](#).

TEAM

Team Description

Code ID - three characters

This defines the technician teams. Usually a technician is defined as being part of a team. The **Maintain FSG/Territory/Team** [task](#) associates team and technicians with [model](#) and customer attributes so that a team, and possibly a technician, can be retrieved as the [job](#) is being created.

TEMT

Template Type

Code ID - 1 character

This allows you to set up template type that can be used to differentiate between local and global templates.

TPER

[Timesheet](#) Period Days

Code ID - 2 characters (always 01)

This allows you to set up a number of days to allow [timesheets](#) and expenses to be entered where their transaction date is within this number of days previous to the current period.

TRFM

*[Transfer Method](#)

Code ID - 1 character

This indicates the way in which the [job](#) will post to the [General Ledger](#)

0 P&L

1 [WIP](#) - Month End

2 [WIP](#) - Release

3 [WIP](#) - Close & Rel

8 Hold

For a fuller description, see the [AFI](#) chapter of this product guide.

TSKN

[Task](#) Codes

Code ID - three-digit numeric

If any values are set up, these will be the only codes allowed to be entered in a template structure and in a [job](#) structure. If no codes are set up, you can enter any code when creating structures.

TXTI

Standard Document Text

Code ID - two characters

This defines the text for standard documents, for example, Advice Note, Acknowledgement. Each text type will have a standard document template available for maintenance using the Maintain Standard Text [task](#).

These templates are then used throughout the system. For example, [quotations](#) are printed from the [quotation](#) module, acknowledgements are printed from [call](#) logging, etc.

TXTO

Text Destination Codes

Code ID - three characters

This defines the people to whom you can send text, for example, Sales [Manager](#), Operator. The text here is entered via the Maintain Standard Text [task](#) function. If text is entered with a destination and date, it will be printed out by the day end program on that date.

TYDS

*Billing Type Description

Code ID - two characters

This defines the type of billing allowed: for example, Fixed Service, Rental. This is displayed on the Billing Maintenance pop up used in [contract](#) header maintenance and will be printed on the [contract](#) invoice.

VSTP

[Scheduled Visit Profiles](#)

Code ID - three characters

This defines the quantity of [visits](#) produced using the [scheduled visit profile](#): for example, fortnightly, and monthly. The 3-character code should reflect the frequency of the [visits](#). Once a code is created, a schedule of [visits](#) can be associated with it.

WAIT

Wait Times for Sleeper [Jobs](#).

Code ID - one character

This defines the delay time for specific [jobs](#), such as Incoming Transaction Monitor used in remote communications.

WCLC

Warranty Claim Labour Credit

Code ID - three characters

This defines the warranty claim labour credit code. A number of code types can be set up and have [model](#), fixed rates and hourly rates associated with them using the Maintain Warranty Claim Labour Credit Note [task](#).

Each dealer eligible for payment must have a warranty claim labour credit code associated with them using the Maintain Additional Customer Details [task](#) if you wish to compensate them for labour.

WRFL

Warranty Claim Flag

Code ID - one character

This defines the types of warranty claim allowed, for example, warranty parts claim allowed or labour and parts or labour only.

WVAL

Warranty Claim Value Limit

Code ID - PCVL

This allows you to define an upper limit for the value of a part listed on a warranty claim. If the parts value is greater than this value, the part will be requested from the dealer before a credit note is issued.

XTYP

*Text Types

Code ID - two characters

This defines the type of text allowed, for example, [job](#) story text, invoice text equipment text, etc.

ZONE

Zone Charge Description

Code ID - one character

This defines the codes for the mileage zones, for example, inner city, suburbs. If a customer is to be charged for mileage, it can be based on actual mileage driven, standard mileage from the nearest service [branch](#) or zones, where a zone code is associated with a charge and a customer.

240E

*[Job](#) History Enquiry Options

Code ID - two character

This defines the current available list of options that can be used in the Enquire on [Job](#) History [task](#).

240P

*Work Control Function List

Code ID - two characters

This defines the current available list of options that can be used in the **Work Control** [task](#) [3/EQS].

320P

*Warranty Claim Function List

Code ID - two characters

This defines the current available list of options that can be used in the **Work Control** [task](#) [3/EQS].

Codes/Parameter Selection Window

To display this window, select the Maintain Codes/Parameters [task](#).

There are two categories of parameters in Equipment Servicing, those that are set up in advance and are installed with the software (system-defined parameters) and those that you set up (user-defined parameters).

System-defined parameters have a description that starts with an asterisk (*).

Any parameter, whether system-defined or user-defined, consists of:

Note: *The parameter type corresponds to the major type parameter in other modules, and the parameter ID to the minor type.*

There are two main functions you can perform from this window:

- Select the required parameter type. The Parameter Code Selection window will be displayed, where you can select the parameter ID/code you require, or enter a new parameter ID/code.
- Enter the parameter type you require in the Parameter Type field and the parameter ID (new or existing) in the Parameter ID field and then press Enter. The Codes/Parameter Maintenance window is displayed for IDs.
- Enter the parameter type you require in the Parameter Type field and use the prompt facility. The Parameter Code Selection window is displayed, where you can select the parameter ID/code you require or enter a new parameter ID/code.

Fields

Parameter Type

If you want to create a new parameter type or amend an existing one, enter PTDS here, enter the code of the parameter type in the Parameter ID field, and then press Enter.

If you want to create a new parameter ID, or maintain an existing one, for a parameter type that already exists, enter the relevant parameter type here, enter the parameter ID in the Parameter ID field, and then press Enter.

Parameter ID

If you want to create a new parameter type or amend an existing one, enter PTDS in the Parameter Type field, enter the code of the parameter type here, and then press Enter.

If you want to create a new parameter ID, or maintain an existing one, for a parameter type that already exists, enter the relevant parameter type in the Parameter Type field, enter the parameter ID here, and then press Enter.

Options

Select

Use this to select a parameter type and display the existing parameter IDs that are set up for it.

Caution: Do not amend or delete any of the supplied parameter types unless advised to do so: you may get unpredictable results.

Enter PTDS in the Parameter Type field and the code of a parameter type in the Parameter ID field and then press Enter to display the Codes/Parameter Maintenance window for Types.

Enter a parameter type in the Parameter Type field and a parameter ID in the Parameter ID field and then press Enter to display the Codes/Parameter Maintenance window for IDs.

Select a parameter type to display the Parameter Code Selection window.

Codes/Parameter Maintenance Window for Types

To display this window, enter PTDS in the Parameter Type field and the code of a parameter type in the Parameter ID field and then press Enter on the Codes/Parameter Selection window.

Use this window to set up or maintain a parameter type. If users will need to set flags against the parameter type, set them up using the Character 1, 2 and 3 fields.

Fields

Description (Maximum) Size

Enter a value between 1 and 30 to define the length of the description of the parameter IDs for this parameter type.

ID Size

Enter a value between 1 and 4 to define the length of the parameter IDs for this parameter type.

Format

Select one of the following:

Character (C) - To create character-based parameter IDs

Numeric (N) - To create numeric-based parameter IDs

Description

Enter a parameter type description of up to 30 characters.

As a security measure, any description with the character * can only be maintained from the Utilities version of this [task](#).

Value Required

Use this checkbox as follows:

Unchecked - If parameter IDs for this type do not require a value

Checked - If you must enter a value (either an absolute value or a percentage) when maintaining parameter IDs of this parameter type

Value Description

If you **checked** the Value Required field, any text entered in this description field will be displayed on the Parameter ID Maintenance window next to the field where the value has to be entered.

Value Type Description

If you **checked** the Value Required field, any text entered in this description field will be displayed on the Parameter ID Maintenance window next to the one-character field where P (Percentage) or V (Value) can be entered.

Character 1 Req

Use this checkbox as follows:

Unchecked - If no field is required

Checked - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under system-maintained parameter type PMC1.

Character 1 Description

If you **checked** the Character 1 Req field, this description indicates how the character flag will be used.

The entry is held under system-maintained parameter type PMC1.

Character 2 Req

Use this checkbox as follows:

Unchecked - If no field is required

Checked - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under system-maintained parameter type PMC2.

Character 2 Description

If you **checked** the Character 2 Req field, this description explains what the character flag is for.

The entry is held under system-maintained parameter type PMC2.

Character 3 Req

Use this checkbox as follows:

Unchecked - If no field is required

Checked - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under system-maintained parameter type PMC3.

Character 3 Description

If you **checked** the Character 3 Req field, this description indicates how the character flag will be used.

The entry is held under system-maintained parameter type PMC3.

Allow Blanks

This field is only displayed when you are using the Utilities version of this [task](#).

Use this checkbox as follows:

Unchecked - To force the entry of 1 or 0 in the Character 1 or Character 2 fields when maintaining the parameter IDs

Checked - To allow blank entries in the Character 1 or Character 2 fields when maintaining the parameter IDs

Note: *The rule does not apply to entries or blanks in the (two-character) Character 3 field.*

Caution: Do not amend or delete any of the supplied parameter type definitions unless you are specifically advised to do so by your agent, as unpredictable results may occur.

Press Enter to save the changes and display the Codes/Parameter Selection window.

Parameter Code Selection Window

To display this window, select a parameter type on the Codes/Parameter Selection window.

Use this window to set up or amend parameter IDs. The window lists all parameter IDs already set up for the selected parameter type.

Note: You should not create more than 10 parameter IDs for parameter type DAYT.

Note: If you set up more than 10, [call](#) logging ignores from the 11th code. As the Working Days code is often W, and therefore at the end of the list of codes, the software ignores this code, which leads to unpredictable results.

Select a parameter ID to display the Codes/Parameter Maintenance window for IDs.

Codes/Parameter Maintenance Window for IDs

To display this window, enter a parameter type in the Parameter Type field and a parameter ID in the Parameter ID field and then press Enter on the Codes/Parameter Maintenance Selection window.

Alternatively, select a parameter ID on the Parameter Code Selection window.

Use this window to set up or amend the description for a parameter ID.

If this parameter type has additional fields set up for it (using the Character Required fields on the Codes/Parameter Maintenance window for Types), they are displayed here.

Fields

Description

Enter the parameter ID description. You specified the length of this field in the Description Maximum Size field on the Codes/Parameter Maintenance window for Types.

Value or Percentage Code

This field is only displayed if it is selected on the parameter type.

Enter one of the following:

P - Percentage

V - Value

Actual Percentage or Value Figures

Enter the required value, either as a percentage or as an absolute value.

Value Field(s)

These are not standard fields that will always appear on this window. You only see these fields if you specified extra values and characters for the parameter type on the Codes/Parameter Maintenance window for Types, using the Character Required fields.

Enter the required value(s). The software stores these under system-generated parameter types PMC1, PMC2 or PMC3, depending on whether it is for line character required fields 1, 2 or 3.

Press Enter to save all your changes.

Recreate Customer Search Index [4/EQU]

The customer search index is a complete index of the words, or part words, in the customer name. In addition, you can select two extra fields from the customer's details for use as search arguments. You set up the requirements for these two search fields in the Inventory Management Descriptions file, under parameter type OTHR.

Equipment Servicing [calls](#) this re-build automatically when you add new customer details. If you change any of the search criteria, or think you have corrupted the index, run this [task](#) to re-build the index.

This batch [job](#) re-sets all the index data to those items selected from the customer details.

Note: *Equipment Servicing loses any additional information entered into the index.*

Select **Confirm Submit (F8)** to submit the batch [job](#).

Change Branch [5/EQU]

Use this [task](#) to select another [branch](#) in which to work.

Branch Selection Window

To display this window, select the Change [Branch task](#).

This window displays a list of all the [branches](#) to which you are authorised, each with a selection field alongside it.

Options

Select

Use this to select the appropriate [branch](#).

Select the appropriate [branch](#) to leave the [task](#) and begin to work in the selected [branch](#).

Note: The [branch](#) in which you are working is normally displayed at the top of the window.

Job Details Pending Prime Currency Print [6/EQU]

Use this [task](#) to print a list of all the [job](#) details that have been selected for Prime to Prime Currency Conversion.

You select the details within the Prime to Prime Conversion application and then run a utility to change the customer's prime currency. This report prints the details for all [jobs](#) selected for the conversion but not converted.

For each [job](#), [sub-job](#) or [task](#) this reports lists:

Select **Confirm Submit (F8)** to submit the [job](#).

Update Commitments [7/EQU]

Within Equipment Servicing, you define and process commitments as follows:

On Demand Commitments Update Window

To display this window, select the Update Commitments [task](#).

Fields**Job Discipline**

Enter a [job](#) discipline.

Alternatively, use the prompt facility to select from the [Job](#) Discipline pop-up.

Job Category

Enter a [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Job Number

Enter a valid [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

You can leave all these fields blank to process all appropriate [jobs](#) for the [company](#).
Select **Submit (F8)** to submit the [job](#).

EQ Disposal Movements [8/EQU]

This is a batch [job](#) designed to create the [World Trade](#) movements for Equipment Servicing. When parts are used for Equipment Servicing [jobs](#) and the invoice generated, movement records are created. You must then run this [task](#) to transfer these movements to [World Trade](#).

This [task](#) has no parameters required for submission.

Select **Confirm Submit (F8)** to submit the [job](#).

Reinstate Jobs [9/EQU]

Use this [task](#) to re-instate [jobs](#). You can re-instate all levels of a [job](#) or just a specified level. This [task](#) produces a report listing all [jobs](#) re-instated, and lists any failed [jobs](#) with reasons for failure.

Close/Reinstate Jobs Window

To display this window, select the Re-instate [Jobs task](#).

Use this window to specify the [job](#) and levels you want to close or re-instate.

Fields

Job/Sub-job/Task

Enter the [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

If you enter a [job](#) or a [sub-job](#), you can re-instate the specified level and all levels below it (that is, all [tasks](#) associated with that [job](#) or [sub-job](#)).

All Levels

Use this checkbox as follows:

Unchecked - To re-instate only the [job](#) detail entered

Checked - To re-instate the [job](#) detail at the specified level and at all lower levels

Note: You cannot re-instate [job](#) details with a [transfer method](#) of 3 or 6.

Select **Confirm Request (F8)** to submit the [job](#) and produce the report.

Change Job Category [10/EQU]

Use this [task](#) to change the [job category](#) on a [job](#) at any time up until any transactions for the [job](#) have been released for invoicing.

This [task](#) requires exclusive use of the [company](#).

Within Work Control, you can the change [job category](#) up until the first actual transaction takes place.

If you wish to change the [job category](#) of a [job](#) that has actual transactions booked to it, you must use this stand-alone [task](#), access to which should be strictly controlled.

Note: *There is an assumption that the original [job category](#) was wrong and therefore all files with the [job category](#) and [job](#) number in them are updated.*

Note: *This is not the same as the [job category](#) change used in the [Job Completion task](#). That only changes the transaction records and re-prices them. This change will do the same but also change the associated [Job Header](#) and [Job Lines](#) records.*

If a [job](#) has mixed [job](#) categories on it, you will be warned but will be allowed to proceed. Only the original [job category](#) will be changed to the new one and not any others.

If actual transactions exist, they will NOT be re-costed but will be re-priced to ensure that the end customer is charged according to the final [job category](#) on the [job](#).

Change Job Category Window

To display this window, select the Change [Job Category task](#).

Use this window to select the [job](#) number and the new [job category](#) to be used.

Fields

Job Number

Enter a [job](#) number.

Alternatively, use the prompt facility to select from the Select [Job](#) Header pop-up.

The [job](#) number must be valid and must have a status lower than 50 (Ready for Billing). There must be no invoiced transactions for the [job](#).

From Job Category

This is displayed, along with its description, when a [job](#) number is entered.

To Job Category

Enter a valid [job category](#).

Alternatively, use the prompt facility to select from the [Job Category](#) Selection pop-up.

Note: The [job category](#) should be in the same [job](#) classification range. In other words, the From and To categories should either be less than category 04 or between category 04 and category 08.

Note: [Job](#) categories of 09 cannot be used.

Select **Confirm Request (F8)** to change the [job category](#).

Job Cost Reversal [11/EQU]

Use this [task](#) to remove labour and direct transaction [costs](#) from a [job](#) because of mistaken bookings.

Purchasing, [Sales Order Processing](#) and manufacturing [costs](#) will not be removed.

This [job](#) requires exclusive use of the [company](#).

Note: a transaction can only be reversed once.

Job Cost Reversal Initial Window

To display this window, select the [Job Cost Reversal task](#).

Use this window to select the [job](#) number for the transaction to be reversed.

Fields

Job Number/Sub-job/Task

Enter the [job/sub-job/task](#) number of the transaction to be reversed.

Alternatively, use the prompt facility to select from the Select [Job](#) Detail pop-up.

Press Enter to see a list of transactions on the [Job Cost Reversal Transaction](#) window.

Job Cost Reversal Transaction Window

To see this window, enter or select a [job](#) number and then press Enter on the [Job Cost Reversal Initial window](#).

Use this window to select the transaction or transactions to be reversed.

The window lists all transactions for the selected [job/sub-job/task](#) but protects those that have already been reversed or already released for invoicing.

Any transactions for Inventory or for Equipment Servicing purchase orders are completely excluded from the selection.

Options

Detail

Use this to view the Equipment Servicing Enquiry Financial Details window.

Reverse

Use this to reverse the selected transaction.

A duplicate transaction will be written, which will reverse out the [costs](#). This transaction will be flagged so that it and its original will not be printed by the invoice print program.

Select **Update (F8)** to update the reversals as entered and return to the [Job Cost](#) Reversal Initial window.

Load Initial Contract [15/EQU]

Use this [task](#) to load [contracts](#) that are already active in a different Equipment Servicing application into System21 Equipment Servicing. Only use this [task](#) for [contracts](#) invoiced in full or in part by the old application. Use the standard Maintain [Contracts task](#) to load [contracts](#) that you have never invoiced.

Note: You cannot use this [task](#) for copy-based [contracts](#). Enter these [contracts](#) using the Maintain [Contracts task](#). The software can then track estimates and billings from the renewal date.

Description

This [task](#) is very similar to the standard Maintain [Contracts task](#). Refer to that section in the [Contracts](#) Database chapter of this product guide for full details of the windows displayed. There are two major differences:

To use this [task](#) effectively, you must extract the [contract](#) start date, [termination](#) date, equipment covered and inclusion dates from the old application.

If there are any instalments within the [invoice term](#), you must extract the [invoice frequency](#). For example, for four instalments within an [invoice term](#) of 12 months, set the months between invoices to 3. If you do not use instalments, set the months between invoices to the same value as the [normal invoice term](#). For each [contract](#) you want to load, determine the period to invoice next, and whether you require instalments. The [next term starts on](#) date must not equal the [contract](#) start date; this means that you have never invoiced the [contract](#). If this is the case, do not load the [contract](#) using the Load Initial [Contract task](#); use the standard Maintain [Contracts task](#).

If the [contract termination](#) date equals the [next term ends on](#) date, you have previously fully invoiced the [contract](#). If the date is not a multiple of the [contract](#) start date and the frequency [terms](#), a warning is displayed to notify you that the [next term starts on](#) date and the [next term ends on](#) date may be out of step. However, if the [next term starts on](#) date is earlier than the [next term ends on](#) date (except for fully invoiced [contracts](#)), you can enter almost any dates.

Scheduled Service Visits

If applicable, the software generates scheduled service [visits](#) from the [contract](#) start date until the [contract termination](#) date. However, since the software never generates [visits](#) before the current date, it only creates those [visits](#) forward from the current date. You should check all [visits](#) generated for a [contract](#).

Day End Routines [20/EQU]

Use this [task](#) to perform daily housekeeping procedures on your database. To maintain data integrity, it is important that you run this [task](#) at approximately the same time every day.

Note: You must have exclusive use of Equipment Servicing to run this [task](#).

This [task](#) performs the following [jobs](#):

Reports Produced

This [task](#) produces the following reports:

This [task](#) has no parameters required for submission.

Select **Confirm Submit (F8)** to submit the batch [job](#).

Period End Routines [21/EQU]

Use this batch [job](#) to keep the calendar in line with the period end dates defined for the [company](#). It also extends the schedule of regular planned service [visits](#), for long-[term](#) or never-ending [contracts](#).

Note: You must have exclusive use of Equipment Servicing to run this [task](#).

You should only run this batch [job](#) once at the end of each [service period](#), and after running the Day End Routine.

The month-end procedures include:

- If the system date is a period end date, Equipment Servicing updates the current [service period](#) to the next period.
- If the system date is not a period end date, Equipment Servicing does not update the [service period](#).

Note: This routine does not affect the [accounting period](#) end. To update the [accounting period](#), change the field in [Company Profile Maintenance](#).

The batch [job](#) extends the schedule of planned service [visits](#) for [contract](#) equipment as follows:

- Start period - This is the Start Next Profile Load From period, if this is not zero. Otherwise, Equipment Servicing uses the earlier [service period](#) of either the [contract](#) start date, or the equipment inclusion date.

- End period - This is the [service period](#) of the [contract termination](#) date or equipment removal date, whichever is the earlier. If the [contract](#) is a never-ending one, the end period is the start period plus the number of [service periods](#) to load (from the [company](#) profile).
- Actual [service period](#) = Start period + Relative period

If the actual period is less than or equal to the end period, Equipment Servicing creates a scheduled [visit](#) record. Once the [job](#) reaches the end period, the processing stops.

Reports Produced

This batch [job](#) produces the Extend Scheduled [Visits](#) Audit report.

Note: Once this batch [job](#) has completed successfully, you must select the Load Planned Maintenance [Jobs task](#) to convert the extended [visits](#) to actual [jobs](#).

Select **Confirm Submit (F8)** to submit the batch [job](#).

Delete Messages [22/EQU]

Use this batch [job](#) to remove technician or machine messages, or both, from Equipment Servicing, up to a selected expiry date. You should run this batch [job](#) approximately every six months.

You can also use this batch [job](#) to report on messages deleted before a user accessed and displayed them.

You can remove messages superseded by events or with an expiry date far into the future.

Message Deletion Window

To display this window, select the Delete Messages [task](#).

Use this window to select the messages you want to delete.

Fields

Delete Technician Messages

Use this checkbox as follows:

Unchecked - Not to delete technician messages

Checked - To delete technician messages

Delete Machine Messages

Use this checkbox as follows:

Unchecked - Not to delete machine messages

Checked - To delete machine messages

Delete Messages with Expiry Date Up To

Enter or select the expiry date up to which you want to delete messages.

Report Deleted Messages Never Displayed

Use this checkbox as follows:

Unchecked - Not to print a list of all messages never displayed and deleted by this [job](#)

Checked - To print a list of all messages never displayed and deleted by this [job](#)

Select **Submit (F8)** to run the batch [job](#).

Serious Error Report [23/EQU]

This batch [job](#) prints out any serious errors logged since you last printed this report. You should undertake specific corrective action for any errors reported.

You can choose the kinds of error to include in the report. You can choose whether you want to print the report, or clear the serious errors file, or both.

The only serious error condition defined in Equipment Servicing is when you have not set up the daily calendar far enough ahead to handle the generation of [contract visits](#).

The report is for the whole [company](#), not just for a [branch](#).

Implications

After printing this report, you cannot print the errors included in it again using this print [task](#), but Equipment Servicing does keep the errors on the file.

You must take positive action to correct the errors. This may include updating and extending main data files, and correcting transaction records affected by the data file deficiencies.

If you check the Clear Serious Error File field, Equipment Servicing deletes all records on the file. There is no in-built archiving process.

Fields**Print Report**

Use this checkbox as follows:

Unchecked - Not to print the report

Checked - To print the report

Clear Serious Error File

Use this checkbox as follows:

Unchecked - Not to clear the Serious Error file

Checked - To clear the Serious Error file

Select **Submit (F8)** to submit the batch [job](#).

Rebuild Model Search [24/EQU]

Use this [task](#) to refresh the [Model](#) Master Scan List pop-up.

Request a Model Search Rebuild Window

To display this window, select the Rebuild [Model](#) Search [task](#).

Select **Submit (F8)** to rebuild the [model](#) search words.

Setup EQ Revaluation Data [40/EQU]

Use this [task](#) to set up parameters to be used to revalue parts and labour transactions at month end if [costs](#) have changed.

This [task](#) is compatible with Work Management and you can run it as part of a Business Process in [@ctive Modeler](#).

Select Branch Prompt

Select the option from the menu to see the [Branch](#) Selection prompt.

Fields

Select Branch

Enter a [branch](#). Alternately, use the prompt function to search for a [branch](#).

Enter a [branch](#) and continue to the Revaluation Data for [Branch](#) window.

Revaluation Data for Branch Window

To display this window, enter a [Branch](#) in the Setup EQ Revaluation data prompt.

Fields

Default Labour Cost List

Enter a default [cost](#) list for the month end average [costs](#). Alternately, use the prompt function to select from a list of labour [cost](#) lists

This cannot be the same as the one on the EQ [Company](#) profile. It is used to revalue the labour/ travel transactions against the [job](#).

Revalue Inventory Expense Type

Select an [expense type](#) for the Inventory revaluation [costs](#) to be allocated to. Alternately, use the prompt function to select from a list of [expense types](#).

Revalue Inventory Transaction Type

Enter the Transaction Type to be used for the effects of revaluing inventory transactions. This must be a valid code in the EQ parameter TRNT. A prompt is available.

Revalue Inventory Charge Code

Select a [charge code](#) for the Inventory revaluation [costs](#) to be allocated to. Alternately, use the prompt function to select from a list of [charge codes](#)

Revalue Timesheet Expense Type

Select an [expense type](#) for the [timesheet](#) revaluation [costs](#) to be allocated to. Alternately, use the prompt function to select from a list of [expense types](#).

Revalue Timesheets Transaction Type

Enter the Transaction Type to be used for the effects of revaluing Timesheet Labour Costs. This must be a valid code in EQ parameter TRNT. A prompt is available.

Revalue Timesheet Charge Code

Select a [charge code](#) for the [timesheet](#) revaluation [costs](#) to be allocated to. Alternately, use the prompt function to select from a list of [charge codes](#).

Revalue Travel Expense Type

Select an [expense type](#) for the travel revaluation [costs](#) to be allocated to. Alternately, use the prompt function to select from a list of [expense types](#).

Revalue Travel Hours Transaction Type

Enter the Transaction Type to be used for the effects of revaluing Timesheet Travel Costs. This must be a valid code in EQ parameter TRNT. A prompt is available.

Revalue Travel Charge Code

Select a [charge code](#) for the travel revaluation [costs](#) to be allocated to. Alternately, use the prompt function to select from a list of [charge codes](#).

Note: [AFI](#) setup should be done to process each [transaction type](#) to the required accounts.

Note: [Expense types](#) and [charge codes](#) cannot be the same as on the EQ [Company](#) profile.

Press **Update(F8)** to validate and update the details

Simulate Additional Costs [41/EQU]

Use this [task](#) to simulate the revaluation transaction of parts, labour and travel expense at month end if change in [cost](#) and produce a report

Generate Additional Costs [42/EQU]

Use this [task](#) to revalue parts and labour transactions at month end if [costs](#) have changed.

This [task](#) is compatible with Work Management and you can run it as part of a Business Process in @ctive [Modeler](#).

Revaluation will be done for transactions posted in the selected period and those raised in the period where the transaction date falls in a prior period; it will not revalue a transaction for a prior period that has already been revalued.

A report of revalued transactions is produced.

This may differ from the simulation if [cost](#) rates have changed or where potential revaluation transactions fail validation (these will be reported but not included in the report totals).

Select Period Prompt

Select the option from the menu to see the Select Period prompt.

Fields

Select Period

Enter the previous EQ period; e.g. if the current period is 2405 it is only possible to enter 2404 in here.

This option will be run once at the end of a period (start of the following period to re-[cost](#) all the previous periods transactions.

It will also have to revalue transactions posted in prior periods that are still in [WIP](#).

Note: *The transactions will be generated with a date of the final day of the period in question.*

Revalue WIP Jobs

Use this checkbox as follows:

Unchecked - If [WIP jobs](#) are not to be revalued

Checked - If [WIP jobs](#) are to be revalued

Note: *The [job](#) is in [WIP](#) if the [Transfer method](#) is 1, 2 and 3 and there is no release value.*

Revalue P&L Jobs

Use this checkbox as follows:

Unchecked - If P&L [jobs](#) are not to be revalued

Checked - If P&L [jobs](#) are to be revalued

Note: The [job](#) is a P&L [job](#) if the [Transfer method](#) is 0 and the [job](#) is still open.

Revalue Completed Jobs

Use this checkbox as follows:

Unchecked - If completed [jobs](#) are not to be revalued

Checked - If completed [jobs](#) are to be revalued

Appendix A Glossary

Accounting Period

A specific number of days, identified by a start and end date, which controls postings to Accounts Receivable and General Ledger

Accounts Payable

You

can enter costs attributed to outside sources, such as sub-contractor costs, bought out materials and services, into Equipment Servicing via Accounts Payable. To do this, accept the invoice into Accounts Payable with a request for additional information, such as job/sub-job/task, plus a breakdown of the type of expense. You can also enter employee expenses through Accounts Payable.

Accounts Receivable

Equipment Servicing shares customer detail information with Accounts Receivable. When you print invoices, the software creates open items and updates accounts.

You must have Accounts Receivable to run Equipment Servicing, because you must enter a customer set up in Accounts Receivable on every job.

Activity

You use activities for two main purposes:

- **Reporting/analysis.** You can attach any number of activities to a [job](#) detail, so that you can report on all [job](#) details that, for example, involved a [site visit](#), or all those you have invoiced.
- **Processing based on completion of [activity](#).** You can attach activities to a [stage payment](#), so that you process the [stage payment](#) when you complete the [activity](#).

AFI

You use Advanced Financial Integrator to take specified codes from a module and create General Ledger account codes for posting. The AFI interfaces with several System21 modules.

Agreement Type

A code used to describe the duration and terms associated with a specific class of contract

Billing Period

This is the period of time for which a contract is protected from a price increase.

Billing Term

This is the period of time for which a contract is protected from a price increase.

Branch

A sub-division of a company, a branch is an organisational unit that controls its own service operations, but shares certain data with other branches of the same company

Budget

You can use multiple budgets and forecasts at any job level. If you want a simple set-up, use one budget code for all jobs, and define different figures for each job.

You can also use the budget codes and forecasts in reports and enquiries. You identify a budget or forecast by its code and type (either budget or forecast). You can use the same code for a forecast and a budget.

You can set budgets at any job level and produce budgets against an expense type at each job level. Equipment Servicing automatically rolls up budgets from a lower level through the job hierarchy. You can record a rolled-up budget at a higher level and then protect it from being overwritten during the automatic roll-up.

Call

A job is a defined set of work at a single customer site, identified by a unique application-generated job number. It may consist of one or more job activities which are set up as sub jobs or tasks in the job structure.

Charge Code

You use charge codes to further breakdown entries against transactions (including standing costs), timesheets and employee expenses. These can include items such as hotel bills, travel time, bank holiday, and sickness. You specify charge codes at transactional level.

Committed Cost

A committed cost is where you have printed the purchase order but not yet matched this to a supplier invoice/received the goods, or where you request an inventory item but it is not yet despatched.

Company

This is a completely self-contained environment for the Equipment Servicing operation. Each company is identified by a unique two-character code.

Contract Conditions

This is a price entered against a piece of equipment on a contract, which overrides the price calculated automatically by the application, using the visit and supplement fees on the contract rates file. The price may be applied at contract header, or machine and peripheral levels; it may cover, for example, fixed service and visit charges, or rentals, or copies/vends rates and standing charges. A special price applies to the normal invoice term of the contract.

Contract Invoice Term

This is the period of time for which a contract is protected from a price increase.

Contract Type

A code used to describe the duration and terms associated with a specific class of contract

Contract

The terms and conditions of maintenance, agreed with a customer, for the provision of service to equipment installed at a customer's site or sites

Cost

You enter cost transactions against a job by specifying the main job, the sub-job and task (if required), plus the expense type. Costs and income are rolled up, or transferred, to the next level. The software holds this level costs and income, as well as the rolled-up costs. The main job and sub-jobs show values of work carried out both at that level and at all subordinate levels.

Cover Type

This defines the equipment price to be charged for an item of equipment in contract pricing, and the charge matrix to be used in job pricing.

Delivery Address

A location where equipment is located, and where jobs will be carried out by field service Technicians

Division

A grouping of products, used for segregating calls

For example, a company may have a common service call administration for two teams of Technicians, covering the same geographic area, but requiring quite different skill sets.

Employee Expenses

You enter employee expenses from either within Timesheets, stand-alone Expenses entry, or from Accounts Payable. If you use Accounts Payable, the transactions are posted to Equipment Servicing when you accept the invoice. The software can automatically calculate the employee mileage and claim amount to charge against a job.

Employee Grade

You define a grade code together with a cost rate per hour and an invoice rate per hour. Each employee (Technician) has an associated grade code.

Equipment Servicing uses the grades associated with a technician to calculate the cost and optionally can use the price against the grade to calculate the selling price on the invoice.

Expense Type

When you enter a cost transaction against a job, it is associated to an expense type. Expense type transactions include materials, labour, and consultancy.

You set up the expense types relevant for a particular job category within the job types parameter. Default expense types are attached to each transaction and when using direct transactions the users are forced to enter them.

You can analyse costs at each level by expense type, giving a very flexible method of analysing costs

Field Service Group

The relationships you define between field service groups, territories, geocodes and teams or Technicians are the basis for selecting a team or Technician when scheduling work in call logging.

If your territories are small, you can set up a team with several Technicians for each territory. The software will schedule the member of the team with the lightest workload. This is no problem where the distances to be travelled are not significant.

However, if your territories tend to be large – more than 50 miles across – then this set up is unlikely to suit you. The software could select the Technician within the team who is located the furthest from the job.

You can avoid this problem by setting up a single Technician for a territory, and then specifying that Technician as the prime Technician for the territory. You would then specify a first, second, and perhaps a third alternative Technician to cover if the prime Technician is unavailable.

You can define any geocode to more than one territory. This is useful if you have service areas that overlap for different products.

General Ledger

Equipment Servicing holds detailed cost and income values while General Ledger (GL) provides a financial summary of job values. You must balance and reconcile these two sets of values.

You can set up an Equipment Servicing sub-ledger within the General Ledger. This ledger can have its own control account for work in progress control, and other holding accounts for costs entered within Equipment Servicing, Inventory Management and Accounts Payable.

Each transaction (cost or income) is posted to a General Ledger account. You use AFI to target a GL account without having to enter a code on every transaction.

General Ledger is a prerequisite to the running of Equipment Servicing.

IN Currency

An IN currency is a European currency that is linked to the Euro currency with a fixed exchange rate.

Installation

One or more items of equipment located on a site

Installation Address

A location where equipment is located, and where jobs will be carried out by field service Technicians

Invoice Consolidation Level

This is a control flag that determines the way in which invoice lines for a customer are grouped on invoices. The levels available are 1 (account level), 2 (account/address level) or 3 (job or contract level).

When World Trade and multi-currency are active, currency breaks and tax regime changes will affect these groupings.

Invoice Frequency

A sub-division of the normal invoice term, this represents the number of months between invoices, if the contract invoice term is to be invoiced in instalments.

Invoice From and Invoice To Dates

These are two dates held on contract invoice lines only, which indicate the period of time that the charge on the invoice line actually covers. This may be the full contract invoice term, or a part of it, if instalment or pro-rata invoicing is involved.

Invoice Period

This is the period of time for which a contract is protected from a price increase.

Invoice Term

This is the period of time for which a contract is protected from a price increase. It is also the number of months for which the contract is normally invoiced at any one invoicing run, for example, 6, 12 or 24 months.

Job

A job is a defined set of work identified by a unique system generated job number. It may consist of one or more job lines, that is activates that need to be performed to complete the top level or prime job.

A Job is the top level of a hierarchy. A job can have up to three levels of detail. You must define the first level (the job or main job). The second (sub-job) and third (task) levels are optional, and you use them for more detailed analysis and control.

Job Line

This is a sub-division of a job. It is a unit of work to be performed on a specific piece of equipment. A job line is identified by the combination of job number, model number and serial number.

Job Category

For each job, you must enter a job category. This dictates how the software processes the job. You specify the job types at job level. You use them:

- To analyse [jobs](#) by like type
- To set defaults for credit checking, income deferral, and so on
- To set default text to appear on invoices
- To identify valid [expense types](#)
- To define chargeability
- To define the process within the system

Location

A location where equipment is located, and where jobs will be carried out by field service Technicians

Manager

You can define manager codes for project managers against jobs. You associate the project manager with any reviews, that is chargeable transaction reviews and invoice reviews. You specify the project manager at job level.

Model

This is a category of machine or equipment. Models exist within model sub-groups, within model groups, within divisions. The model name is usually descriptive of the equipment and is the name by which it is known to sales and customers.

Multi-currency

The choice between multi-currency and single currency is made in the Accounts Receivable company profile. When active, sites can be invoiced in the valid General Ledger currency set on their Additional Service Details records: this is the prime currency.

The ledgers, including costs, will be maintained in base currency: converting between currencies is system generated, in conformance with exchange rates set in General Ledger.

Next Term Ends On

This is the date on which the next contract invoice term to be priced will end. This date is held on the contract billing parameters.

Next Term Starts On

This is the date on which the next contract invoice term to be priced will start. This date is held on the contract billing parameters.

Normal Invoice Term

This is the number of months between invoices.

Order Entry

You can use Inventory Management with Equipment Servicing to capture the cost of Inventory items. You capture the costs within Equipment Servicing, by defining a list of parts which is then transferred to Order Entry using the OI interface.

Sales Order Processing progresses the list of parts, defined as an order, from entry through to despatch. You can produce acknowledgements, pick notes and clean despatch notes for the parts list. Because you produce the invoices within Equipment Servicing, when you confirm despatch, it does not create an invoice - instead the inventory costs are posted to Equipment Servicing. You can assign one sales order to each task.

Owner

When defined against a piece of equipment, the owner is a customer who actually owns that equipment, and who may be invoiced.

Parts List

This is a list of the Inventory items required to complete a job. This is an element of the cost associated with a job detail.

Pending Invoice Line

This is an invoice line not yet assigned an invoice number or posted to the ledgers. It is waiting to be grouped with other invoice pending lines to form an invoice. This grouping is dependent on the customer's invoice consolidation level.

Pending Invoice Line Availability Date

This is a date held on each pending invoice line, which defines when the invoice line may be released for consolidation into an invoice. For in advance contract invoice lines, this will be the start date of the contract invoice term or instalment period. For in arrears contract invoice lines, this will be the end date of the contract invoice term or instalment period. For job invoice lines, this will be the date on which the line was created, that is, the pricing date.

Picking Note

This is a list of stocked items to pick from the stockroom.

Quotation

You can build up estimated costs using the standard functions, including parts lists and user-defined expenses. You can adjust mark-up percentages to compare different proposed selling prices. You can convert the quotation to a live job, and you can use the estimated costs as budgets.

A contract quotation is a set of records identical to a contract, but with a special status of quotation.

Sales Order Processing

You can use Inventory Management with Equipment Servicing to capture the cost of Inventory items. You capture the costs within Equipment Servicing, by defining a list of parts which is then transferred to Order Entry using the OI interface.

Sales Order Processing progresses the list of parts, defined as an order, from entry through to despatch. You can produce acknowledgements, pick notes and clean despatch notes for the parts list. Because you produce the invoices within Equipment Servicing, when you confirm despatch, it does not create an invoice - instead the inventory costs are posted to Equipment Servicing. You can assign one sales order to each task.

Scheduled Visit Profile

This defines the number, type and frequency of scheduled maintenance visits, by means of relative service periods and job categories.

Serial Number

This is a number that, in combination with a model code, uniquely identifies a single unit to be serviced. The use of serial numbers is strongly recommended where it is practicable.

If the use of serial numbers is not practicable, then Equipment Servicing enables you to enter a quantity instead. This means that the system still has an exact record of the equipment you have at each installation, even if individual pieces of equipment cannot be identified.

Service Agreement

The terms and conditions of maintenance, agreed with a customer, for the provision of service to equipment installed at a customer's site or sites

Service Contract

The terms and conditions of maintenance, agreed with a customer, for the provision of service to equipment installed at a customer's site or sites

Service Period

A specific number of days, identified by a start and end date, that controls scheduling and monitoring of service jobs

Site

A location where equipment is located, and where jobs will be carried out by field service Technicians

Special Price

This is a price entered against a piece of equipment on a contract, which overrides the price calculated automatically by the application, using the visit and supplement fees on the Contract Rates file. The price may be applied at contract header, or machine and peripheral levels; it may cover, for example, fixed service and visit charges, or rentals, or copies/vends rates and standing charges. A special price applies to the normal invoice term of the contract.

Stage Payment

You make any fixed price job detail payments made in stages.

When you reach the date assigned to the payment, the payment is made. A stage payment can depend on the completion of a number of activities, or on the arrival at a payment date.

Standing Cost

You use standing costs to simplify the posting of costs against a job number, if the cost is regular or standard, for example, rent of machinery.

You can associate a set of job numbers to each standing reference. You can also set up reversible standing costs to deal with periodic accruals.

Status Code

Each job line has a status code they range from 01 (Customer to send) and 99 (Job complete). You use these to monitor the progress of jobs.

The job statuses are fixed by the system.

Sub-job

You can enter up to three levels of detail for each job. You must define the first level (the job or prime job). The second (sub-job) and third (task) levels are optional, and you use them for more detailed analysis and control.

Task

You can enter up to three levels of detail for each job. You must define the first level (the job or main job). The second (sub-job) and third (task) levels are optional, and you use them for more detailed analysis and control

Term

This is the period of time for which a contract is protected from a price increase.

Timesheet

You can record timesheet data on a daily, weekly or monthly basis and periodically update the job costs. The software uses the data recorded to update actual labour costs on both chargeable and non-chargeable jobs, and calculate invoice values on T&M jobs. You can amend timesheets before you post them.

Transaction Source

When you create an Equipment Servicing company, the software creates some transaction sources. These prefix Equipment Servicing transaction numbers and identify the source of transactions logged against a job:

EQ – Equipment Servicing

IM - Inventory movement

PL - Purchase Ledger (Accounts Payable)

PM – Purchase Management

QU – Quotation

RA – revenue Accrual

RC – Release Cost

RI – Release Income

RR – Rev. Accrual Reversal

RS – Stand. Cost release

SC – Standing Cost

SP – Sundry Invoice/Credit

SR – Stand Cost reversal

WA – warranty Claim

ZP – Fixed Price

ZQ – Addition to Quote

When you post a transaction, GL adds a prefix of E to the transaction source and document number. When you transfer the transaction within GL, for example from work in progress to profit and loss, the E is kept, but the transaction source is changed:

IM, JM and PL become RC

SC and SR become RS

RI - Release of income

Transaction Type

You specify transaction types at transaction level to further identify transactions within a job. You define these transactions. As a minimum, you must set up transaction types for any employee expenses, timesheet, Sub Contract, Travel and Inventory transactions.

You must associate an expense type and transaction type to all timesheets and employee expense sheet. You must also define a unique expense type, transaction type and charge code for all inventory movements maintained using the Inventory Management interface.

Transfer Method

You must specify a transfer method for every job detail. This defines how to post the job costs and income from the General Ledger WIP account into Fixed Assets or a profit and loss account. There are 9 transfer methods, 0 to 8:

0 - To post costs directly to P&L. If the job is time and material and you post the cost directly to P&L, then the income cannot go to balance sheet even if the job type is defined as deferred income. If the job is fixed price, and you post the costs directly to P&L, the income can be in the balance sheet if you defer the income.

1 - Initially, costs are posted to WIP then the costs are transferred from WIP to P&L. This transfer happens when you initiate the transfer to P&L.

2 - Initially, costs are posted to WIP then costs are transferred from WIP to P&L. You control which costs and income are transferred using the Release Jobs activity.

3 - Initially, costs are posted to WIP then the costs are transferred from WIP to P&L. You use the Release Jobs activity to release of costs from WIP to P&L, but the job detail must be closed.

4 - Initially, costs are posted to WIP then costs are transferred from WIP to Fixed Assets. All costs are released from WIP to Fixed Assets when you start a batch process.

5 - Initially, costs are posted to WIP then costs are transferred from WIP to Fixed Assets. You use the Release Jobs activity to release of costs from WIP.

6 - Initially, costs are posted to WIP then costs are transferred from WIP to Fixed Assets. You use the Release Jobs activity to release costs from WIP but the job detail must be closed.

7 - Costs are posted to WIP. You cannot transfer the costs to P&L or Fixed Assets.

8 - Costs are posted to WIP. You release costs from WIP to Fixed Assets or to P&L using the Invoicing/Asset Generation activity. You do not need to make the decision as to whether an item is revenue or capital until you use this activity.

Uplift Code

You specify this at timesheet level. You use these to recalculate the cost and price of labour. There are two uplift rates one for cost and one for invoice price. If the cost uplift code is 1.5, then the cost of labour is multiplied by 1.5. If the invoice uplift code is 1.5, then the invoice price of the labour is multiplied by 1.5.

Variation Reason Code

When you change, at job detail level, a budget, a selling price, or the estimated hours, you must enter a variation reason.

Visit

A service job is a defined set of work at a single customer site, identified by a unique application-generated job number. It may consist of one or more job lines, that is, pieces of equipment. Each job line is treated as a separate unit of work within the job, with its own job category, fault code, customer contact name, target response date/time, status and Technician.

WIP

This is also known as work in progress. Within Equipment Servicing, WIP refers to the General Ledger WIP balance sheet account to which all Equipment Servicing costs are posted before you transfer them to a profit and loss account.

World Trade

The correct documentation of service parts transfers and job invoices, where more than one country is involved, within and outside the EC, is the scope of World Trade.

Equipment Servicing interfaces with it for customer, stockroom, country and item maintenance. Currencies and differing tax regimes (for example, VAT and GST) are processed specifically at invoicing, and where stock movements are involved.