

# EQUIPMENT SERVICING

## Service Management

Keeping track of all the important information about your equipment, customer equipment, returned equipment to the manufacturer, and equipment currently under repair is a demanding task. Equipment is constantly on the move and changing. A great way to keep control of your equipment is with SouthWare's Equipment Servicing.

### Benefits

- Know the detailed service history for each piece of equipment serviced
- Know the warranty dates on each piece of equipment sold in order to bill service work accurately and know when to offer a service contract
- Keep track of a piece of equipment as it moves between customers or contracts
- Automatically schedule preventive maintenance service work on equipment that is under contract
- Price service contracts based on rates per piece of equipment on the contract

- Instantly know whether a piece of equipment is covered by a service contract
- Ensure that a service contract is offered on every piece of equipment sold
- Keep track of metered usage on certain equipment
- Know the profitability and repair history of each model of equipment serviced

Equipment Servicing handles the equipment tracking functions for SouthWare's Service Management Series, a complete system for service businesses. With Equipment Servicing you get thorough equipment records so you can provide great service and get paid for your service.

The screenshot shows a software window titled "Maintain Customer Equipment Info" with the following data:

*1. Customer#	1	Carl Sanders					
*2. Contr#	1	Annual Equipment Maintenance-H					
*3. Line #	1	52" Big Screen Stereo Receiver					
4. Equip ID	C1195	Monitor					
5. Serial #	1						
6. +Purchased Info		7. Location (Contract address)					
8. +Warranty Exp	Parts 08/30/15	123 Magnolia Avenue					
9. Loan/Rent?	N Labor 08/30/15	Auburn AL 36830					
10. In Service	06/01/15						
11. +Out of Svc							
SERVICE		BILLING					
12. Priority	1	20. Cntr Value	3700.00	Dt	03/04/15		
13. Travel Miles	N/A	Time	N/A	21. Base Price	1850.00	(Ref only)	
14. Svc Territory	N/A	All		22. +Meter Billing	N	23. +Billing Profit	
15. Svc Tag ID #				24. Comment	25. +Lifetime Avg	N/A	
16. +Preventive Maint	Not Appl						
17. +Meter Readings	Not Appl						
18. +SIO History	19. +Movement History						

Buttons at the bottom: # to change, OK, Cancel. Status bar: DEMO 07/07/17 92

Customer Equipment View

# FEATURES & FUNCTIONALITY

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## STANDARD EQUIPMENT MODEL FEATURES

- Extensive standard information
- Manufacturer info
- Standard preventive maintenance schedules
- General warranty periods and warranty periods for up to 10 components
- Skills/training needed for servicing
- Contract pricing

## CUSTOMER EQUIPMENT FEATURES

- Track by serial #, tag #, or system
- Specific warranty dates based on model
- Sales information
- Loan, rent, out-of-service indicator
- Complete contract history
- Contract pricing information
- Complete history of service orders
- Meter reading history
- Billing, cost, and profit information
- Notes and optional extended data

## PREVENTIVE MAINTENANCE FEATURES

- Up to 10 schedules per equipment model
- Based on time elapsed or metered usage
- Generate PM service orders for equipment

## METER READINGS

- Option per equipment model
- Contract billing provides for base units and rate table for excess usage
- Unlimited history of meter readings
- Record initial, actual, or estimated readings

## INTERFACE WITH RETURN AUTHORIZATIONS MODULE

- Track returns for credit, repair, exchange, warranty work
- Internal or customer-owned equipment

## INTEGRATION WITH CONTRACTS AND SERVICE ORDERS

- Link to contracts and service orders
- Contract billing, service warranties

## INTERFACE FROM INVENTORY/SALES

- Automatically create service records for sold equipment
- Interface with parts inventory, purchasing

## EQUIPMENT SERVICING CAN HELP YOU ANSWER SUCH QUESTIONS AS:

- What equipment is under service contract to this customer?
- What warranties will expire next month on equipment that we've sold so we can offer service contracts?
- Which equipment models have had a poor reliability factor over the last 12 months?
- Do we have the parts we need to do the preventive maintenance scheduled for next week?
- Didn't we have this same problem with this piece of equipment a couple of months ago?
- How many excess units did we bill on this copier last quarter?
- Are we still waiting on an exchange unit to finish this service order?
- Which customer equipment records are not currently covered under a service contract?
- Is the fan in this unit still under warranty?