

The **Periodic Maintenance Scheduling** section of the A.D. Module is a supplementary function of the SRO section. Even though the two sections support each other, they may be used totally independent of each other. The function of this section is to aid and maintain the scheduling of the periodic servicing of specific equipment for specific Customers. A complete schedule of maintenance can be created and automatically added to a specific Service Calendar. Maintenance schedules can even be divided by "route".

To access the **Periodic Maintenance Schedule** section, select the **Periodic'Maint.** menu from the **A.D. Module**:



To create a new Periodic Maintenance Schedule for a specific piece of equipment for a specific Customer, select **Add New Periodic Maint. Item...** from the **Periodic Maint.** menu.

The entry screen for a Periodic Maintenance record consists of three parts:

- Main Entry Screen (Product/Customer Info)
- Equipment Service Log (SRO Service History)
- Calculated Service Dates

There is no **Sections** menu for this entry screen, just control buttons to move back and forth between sections.

File Edit

CUSTOMER CODE: AHW

Anderson Hardware Corporation
Dave Smith
87653 South Rd.
Building #7
Santa Monica, CA 98543
PHONE: (213) 555-1234
FAX: (213) 555-1212

Distribute To Calendar

Exclude Weekends
Bob's Service Schedule

Remove From Calendar

Choose Other Customer Location

ITEM REQUIRING SERVICE:

PART #: F68020

DESCRIPTION: PLUMB™ 68020 COMPUTER

SERVICE CONTRACT / AGREEMENT:

SERIAL #: F3333

AGREEMENT #: AC98989

START DATE: Thursday, November 10, 1994

AGREEMENT DURATION: 24 months

AGREEMENT ENDS: Saturday, November 9, 1996

ROUTE: 2

PERIODIC SERVICE & MAINTENANCE:

SERVICE CODE: SERVICE Service Hourly Charge

SERVICE CHARGE: \$65.00

SERVICE EVERY: 14 days OR ON THIS DAY: 0 SERVICES PER CONTRACT: 52 Start Day 1

NEXT CALCULATED SERVICE DATE: Thursday, March 30, 1995

SAVE CANCEL <- RECORD RECORD -> PRINT Service Log ->

This is the main entry screen. Customer, Equipment, and Service information is entered here.

To start, enter (clairvoyantly if needed) the **Customer Code** of the entity for whom the service will be performed. If a match is found in the **Customer File**, their information will be listed in the space provided. If the **OPTION** key is held down while TABing out of the Customer Code field, the Shipping Address of the Customer is loaded instead of the Billing Address. If the Customer entered has multiple locations, you can choose another an alternant location by clicking the **Choose Other Customer Location** button. If the **OPTION** key is held down while clicking this button, the **Address** and **City** are listed to choose by instead of the normal listing.

To enter the equipment to be serviced, type in its **Part#** and **Description** into the fields provided. These items need not be part of your **Inventory File**. If however a **Part#** match is found, the **Description** will automatically be loaded for you.

SERVICE CONTRACT/AGREEMENT INFORMATION:

It must be assumed that there exists some form of written agreement or contract between you and the Customer. Information and parameters for that agreement are entered here.



SERIAL#:

This is the Serial Number of the item to be serviced.

AGREEMENT#:

This is the reference number that matches your contract, or other written agreement number.

ROUTE:

This is a text field that acts as sort of a Maintenance category. Generally, a Route Number is entered into this field so that Maintenance Schedules can be grouped and processed by individual Service Routes. In this manner, a person servicing a specific Route can gather just their jobs for a given period of time. Actually, anything may be entered into this field, including an Employee Code if desired.

START DATE:

This is the date that represents the beginning of the contract period. This is not necessarily the first scheduled service appointment date, unless **Start Day 1** is checked in the **Periodic Service & Maintenance** area.

AGREEMENT DURATION:

This is the length of time, in months, that the agreement is valid for.

AGREEMENT ENDS:

This is a field that P.I.M.S. places the calculated ending date of the agreement. This does not necessarily represent the last scheduled service appointment.

PERIODIC SERVICE & MAINTENANCE INFORMATION:

This area is used to calculate the various scheduled service dates.

SERVICE CODE/SERVICE CHARGE:

These fields represent optional service information. **SERVICE CODE** is linked to your **Inventory** File. An Inventory item can be loaded into this area by clairvoyantly entering a valid Inventory **Part Code**. Once loaded, the **SERVICE CHARGE** will be set to the Inventory **Price** field. The **SERVICE CHARGE** may be modified. Once again, these fields are optional.

SERVICE EVERY nn DAYS OR ON THIS DAY nn:

These fields represent the "Periodic" of Periodic Maintenance. You have the choice of servicing the Customer every so-many-days, or on a fixed day every month. If you wish to service the Customer's equipment every time an elapsed period of days has gone by, enter that interval (in days) into the **SERVICE EVERY** field. If you wish to service the Customer's equipment on the same day every month, enter that day number into the **OR ON THIS DAY** field. Once entered, the **SERVICES PER CONTRACT** will be calculated by P.I.M.S.


If **Start Day 1** is checked, the first scheduled Maintenance appointment is the same date as the **STARTING DATE** of the contract, else the service period is added to the Starting Date to calculate the first appointment date..

NEXT CALCULATED SERVICE DATE is the date of the next calculated Maintenance appointment.



Once all of the information is entered and the parameters are set, a Maintenance Schedule for this contract can be automatically generated and placed onto a user selected **General Calendar** from the **Calendar** File.

To generate a Schedule, click **Distribute To Calendar**. P.I.M.S. will first build a listing of the Service appointment dates for this contract. It will then prompt the user to choose which Calendar from the **Calendar** File to add these appointments to:



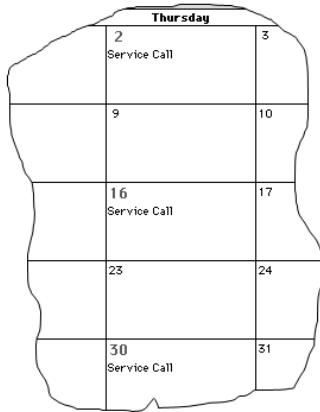
CHOOSE CALENDAR

AVAILABLE CALENDARS:

Bob's Service Schedule
 Employee Vacations
 Employee Work Schedules
 Mary's Service Schedule

NUMBER OF EVENTS: 52
DATE RANGE: 11/10/94 - 11/07/96
REF # AHWP68020F3333

Once a selection is made, the appointments are transferred to that Calendar:



TIME	CALENDAR TEXT	CATEGORY	DISTRIBUTION	SHOW TIME
	Service Call	Route # 2	<input type="checkbox"/> Copy To Employees	<input type="checkbox"/> Show Time

AUTO INSERTION REFERENCE NUMBER: AHWP68020F3333

COMMENT:

SERVICE CALL:
 -----CUSTOMER-----
 Anderson Hardware Corporation
 Dave Smith
 87653 South Rd.
 Building #7
 Santa Monica, CA 90543
 PHONE: (213) 555-1234
 FAX: (213) 555-1212

 PRODUCT REQUIRING SERVICE:
 P68020 - PLUMB™ 68020 COMPUTER
 SERIAL #: F3333
 AGREEMENT #: AC98989
 TYPE OF SERVICE REQUIRED:
 SERVICE - Service Hourly Charge
 SERVICE CHARGE: \$65.00

 COMMENT:
 Get key from main office to unlock back room...



Once the appointments are transferred, they may be removed by clicking the **Remove From Calendar** button.



Distribute To Calendar

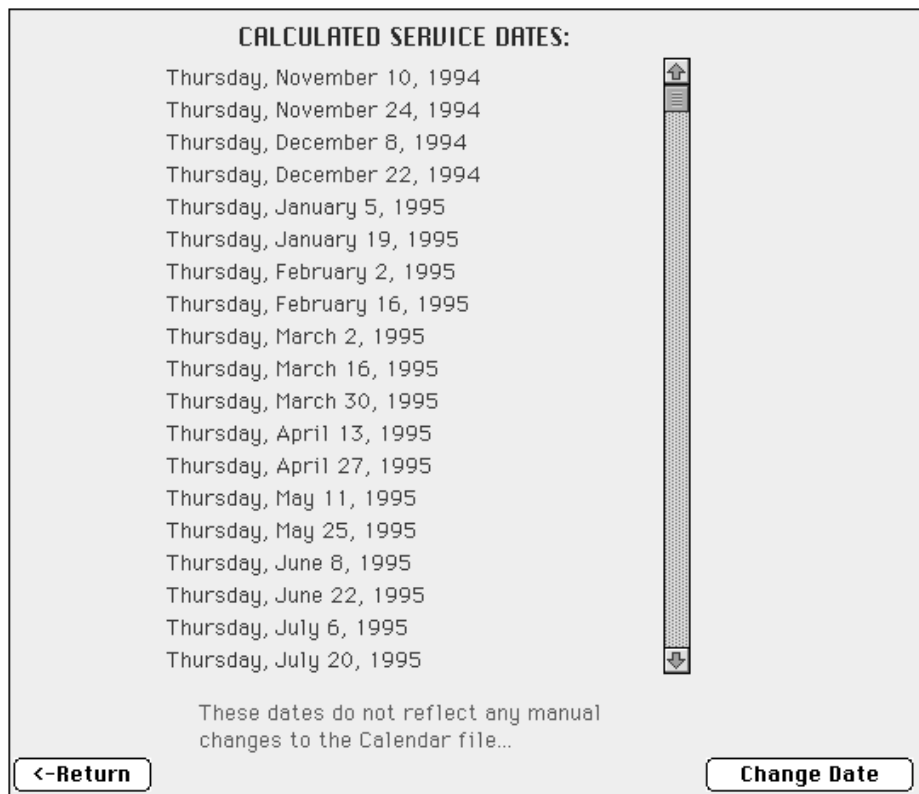
Exclude Weekends

Bob's Service Schedule

Remove From Calendar

If **Exclude Weekends** is checked (the default), no appointments will be made on either a Saturday or Sunday. If a calculated appointment falls on a Saturday, it will be changed to the preceding Friday. If it falls on a Sunday, it will be changed to the following Monday.

Clicking on the name of the Calendar that is displayed above the **Remove From Calendar** button will show a listing of the scheduled dates for this contract:



CALCULATED SERVICE DATES:

- Thursday, November 10, 1994
- Thursday, November 24, 1994
- Thursday, December 8, 1994
- Thursday, December 22, 1994
- Thursday, January 5, 1995
- Thursday, January 19, 1995
- Thursday, February 2, 1995
- Thursday, February 16, 1995
- Thursday, March 2, 1995
- Thursday, March 16, 1995
- Thursday, March 30, 1995
- Thursday, April 13, 1995
- Thursday, April 27, 1995
- Thursday, May 11, 1995
- Thursday, May 25, 1995
- Thursday, June 8, 1995
- Thursday, June 22, 1995
- Thursday, July 6, 1995
- Thursday, July 20, 1995

These dates do not reflect any manual changes to the Calendar file...

<-Return **Change Date**

Any changes that are made manually to the Calendar File that effect any of these dates will not be reflected back on this listing. Individual dates can be changed on this listing, and associated Calendar, by clicking the **Change Date** button.

SERVICE LOG:

The **Periodic Maintenance** record also contains a Service Log for that piece of equipment. To view this log, click **SERVICE LOG**:

File Edit

PLUMB™ 68020 COMPUTER
AHW

SERVICE LOG:

JOB DATE	SERVICING TECHNICIAN	SERVICE PERFORMED	START TIME	END TIME	HOURS WORKED	HOURS BILLED
11/02/94	BC Bruce Childrun	Replaced bad Logic Board. After talking with customer, I found out that they do not have grounded outlets...	10:00 AM	11:27 AM	1.45	1.25
03/14/95	BC Bruce Childrun	The drive mechanism was replaced with a factory part.	1:00 PM	1:30 PM	0.5	0.5

NEW LINE DELETE LINE

COMMENT:
UNIT IS IN BACK ROOM. BE CAREFUL OF LOOSE CABLES...

<-Return

This is the same log that P.I.M.S. automatically sends information to from an SRO, when directed to do so. Entries to this log can also be made manually. Remember, all time entries must be made in 24hr military time. **SERVICING TECHNICIAN** is clairvoyantly linked to the **Employee** File by **Employee Code**.

OTHER CONTROLS AND FUNCTIONS:

List Services Due will prompt the user for a date range and then produce a listing of all Periodic Maintenance records that have a service appointment calculated and due within that date range.



Print Calendar Events allows a user to pick a date range, Calendar, and option Route to isolate, to produce an event listing of Periodic Maintenance appointments:

<h2>EVENT LISTING</h2> <p><u>Bob's Service Schedule</u> 01/01/95 - 03/31/95</p>	
<p>Thu, Jan 5, 1995</p> <p>Service Call - Route# 2 Part#: AHWP68020P3333</p> <p>SERVICE CALL: -----CUSTOMER----- Anderson Hardware Corporation Dave Smith 87653 South Rd. Building #7 Santa Monica, CA 90543 PHONE: (213) 555-1234 FAX: (213) 555-1212</p> <p>----- PRODUCT REQUIRING SERVICE: P68020 - PLUMBTM 68020COMPUTER SERIAL#: F3333 AGREEMENT#: AC98989 TYPE OF SERVICE REQUIRED: SERVICE - Service Hourly Charge SERVICE CHARGE: \$65.00 COMMENT:</p>	
<p>Thu, Jan 19, 1995</p> <p>Service Call - Route# 2 Part#: AHWP68020P3333</p> <p>SERVICE CALL: -----CUSTOMER----- Anderson Hardware Corporation Dave Smith 87653 South Rd. Building #7 Santa Monica, CA 90543 PHONE: (213) 555-1234 FAX: (213) 555-1212</p> <p>----- PRODUCT REQUIRING SERVICE: P68020 - PLUMBTM 68020COMPUTER SERIAL#: F3333 AGREEMENT#: AC98989 TYPE OF SERVICE REQUIRED: SERVICE - Service Hourly Charge SERVICE CHARGE: \$65.00 COMMENT:</p>	
-- 1 --	



AUTOMATIC SRO CREATION FROM PERIODIC MAINTENANCE RECORDS:

SRO records can automatically be created for any selection of Periodic Maintenance Schedules. To do so, produce a listing of Periodic Maintenance records:

File Edit

PERIODIC MAINTENANCE LISTING:

NUMBER OF ITEMS LISTED: 3 LISTING TYPE: Items Requiring Service: 01/01/95 - 03/31/95

CUSTOMER	PRODUCT	ROUTE	DUE
Anderson Hardware Corporation	PLUMB™ 68020 COMPUTER	2	01/05/95
Empire Muffler	PLUMB™ 68040 COMPUTER	2	01/31/95
ExecUtron Computers, Inc.	PRUNE™ LASER PRINTER 600	2	01/16/95

Then, select the records to process and click **CREATE SRO(S)**. A single SRO will be created for each Periodic Maintenance record selected. The SRO will be created with the following information inserted:

- 1) **SRO DATE** is set to Next **Calculated Service Date**
- 2) Customer Information
- 3) **SYMPTOMS** is set to "Periodic Maintenance" + **SERVICE CODE & DESCRIPTION**
- 4) If an **Agreement#** exists:

SERVICE CONTRACT is checked
S.C. PURCHASE DATE is set to **STARTING DATE**
EXP. DATE is set to **ENDING DATE**
AGREEMENT NUMBER is set to **AGREEMENT#**

Once created, the user is given the option of viewing a list of these SROs.



