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# ServicePoint

## Equipment Maintenance Scheduling

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This document has been written to describe the features of the ServicePoint Planned Maintenance functionality. These features have been designed to allow tracking and scheduling of recurring maintenance of customer equipment.

### Setup Options

- **PM Schedules** – PM Schedules (Planned Maintenance) specify the normal interval of time between preventive maintenance of equipment. These schedules are assigned to equipment for use in reporting upcoming maintenance due, and also for automatically opening work orders for maintenance due.

Any number of different maintenance schedules may be set up, depending on the user's needs. There are "Interval" schedules and "Date" schedules. Interval schedules specify the amount of time that passes between planned maintenance. Date schedules specify the exact dates of upcoming maintenance needs.

A sample of a monthly interval schedule appears below.

The screenshot shows a software window titled "PM Schedules" with a standard toolbar at the top. Below the toolbar, there are input fields for "Schedule ID" (containing "M") and "Description" (containing "Monthly PM"). Below these fields are two radio buttons: "Interval" (which is selected) and "Date". Below the radio buttons is a section titled "PM Interval" which contains three rows of settings. The first row is "Normal interval between PM's" with a value of "1" and a unit dropdown set to "Month". The second row is "Window: Early" with a value of "5" and a unit dropdown set to "Days". The third row is "Late" with a value of "1" and a unit dropdown set to "Week".

- **Predefined Jobs** – Optionally, Predefined Jobs may be defined that are work order "templates" to be applied when a work order is created for a specific type of equipment. A predefined job may contain one or more tasks, each with a predetermined amount of labor time assigned, and a list of required inventory items to be used. Notes for the technician may also be included.

**Predefined Jobs**

Job ID **AC-01**
Description **Standard AC Unit Maintenance**
  
Department

Task Detail | Labor | **Parts Used** | Additional Charges

Pts_Seq	Item_No	Inv_Loc	Description	Qty_Used	Unit_Price
> 10	BIO12993	MAIN	Filter pack 26x26	2.00	
20	*MISC	MAIN	1.5 Meter Belt	1.00	

Seq # 
  
Item # 
  
Item description

Inventory location 
  
Main store location

Quantity used 
  
Unit price 
  
Discount % 
  
Ext price

☒ Recalc price when using
   
☐ Use this price
   
Tax ☐

Seq # 
  
Model

Task name 
  
Serial

Invoicing code 
  
Description

## Operational usage and functionality

- **Customer Equipment** – When customer equipment is defined in ServicePoint, the schedule frequency of maintenance is specified by naming the desired PM Schedule.

In the screenshot below, a rooftop air conditioning unit is shown with a monthly maintenance schedule (M), and a predefined job, named AC-01. The “Next PM” date is automatically calculated based on the Last PM date, and the maintenance interval assigned.

**Customer Equipment**

Customer: 1002 Brian Schmidt  
Address ID: EAST  
Model ID: FSP00L  
Serial number: T43014356009  
Qty:   
Eqp description: Chiller, Rooftop - 15 ton

**General** | Contract info | Profiles

Warranty: FISTAR  
PM schedule: M  
PM predefined job: AC-01  
Work category:   
Tag ID: AC-1  
Manufacturer: Trane  
Category/Subcat: A/C ROOF  
Location: Northeast rooftop.

Install date: 8/2/2016  
Removal date:   
Warranty start: 8/1/2016  
Last repair: 5/8/2017  
Last PM: 12/10/2019  
Next PM: 1/10/2020  
Last auto PM:

- **Maintenance Reporting** – The PM's Due Report is used to create a list of equipment due for service, based on a number of criteria. A range of service due dates can be specified, along with the selection of specific equipment categories. The location of equipment may be zoned, to only include equipment that is located in a specific area, as well.

The selection screen below will include all equipment that is due for service within the month of January.

The screenshot shows a software window titled "Preventive Maintenance Due". It contains the following fields and options:

- Report mode:** Two radio buttons. "Next PM only" is unselected, and "All PM's within range" is selected.
- PM date:** Two date pickers. The first is set to "1/1/2020" and the second to "1/30/2020", with a "to" label between them.
- Coverage type:** Three checked checkboxes: "Contract", "Warranty", and "No coverage".
- Customer #:** Two text boxes with "First" and "Last" labels, each with a search icon.
- Contract #:** Two text boxes with "First" and "Last" labels, each with a search icon.
- Equipment category:** A dropdown menu set to "All".
- Zone:** A dropdown menu set to "All".
- Create work orders?:** An unchecked checkbox with the text "(Check this to automatically create calls for service due equipment)".
- Print Report:** A button with a printer icon and the text "Print Report" in the bottom right corner.

The resulting report is displayed in the below screenshot. Note that equipment with differing intervals is included, as long as they meet the entered selection criteria.

Date: 01/06/20Time: 07:56:04 PMAir Compressor SupplyPage 1

PREVENTIVE MAINTENANCE DUE REPORT

PM Date range = '1/1/2020 through 1/30/2020'

Coverage types = 'Contract - Yes, Warranty - Yes, No Coverage - Yes'

Contract range = 'First through Last'

Equipment category = 'All'

Zone = 'All'

Customer: 1001	Svc Address: "MAIN"	John Lincoln 1925 Wondermist Dr.  Memphis, TN 38120	Contact 1 Phone 1 321-455-1864 Contact 2 Phone 2		
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM window
SPA-S 1000231-398	Bypass Humidifier		HSSPA	Y	2/12/2020 1/12/2020 - 3/12/2020

Customer: 1002	Svc Address: EAST	Brian Schmidt - Vacation home 415 Eastern Avenue Unit 3A Middle River, MD 21221	Contact 1 Phone 1 321-433-2343 Contact 2 Phone 2 Joe Jones, neighbor 410-555-9945		
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM window
FSPOOL T43014356009	Chiller, Rooftop - 15 ton		FISTAR	M	1/10/2020 1/5/2020 - 1/17/2020
H150PE 105692-2006	Water Heater Electric, 42 gallon		HAYWARD	Y	1/10/2020 12/10/2019 - 2/10/2020
SRFLT-1 <none>	Commercial Filter		STARITE	M	1/11/2020 1/6/2020 - 1/18/2020

Customer: 1003	Svc Address: "MAIN"	Carol Dawn 1438 Corporate Lane Apt 1A Memphis, TN 38118	Contact 1 Phone 1 321-443-5436 Contact 2 Phone 2		
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM window
H150PE 131000-12001	Water heater Electric, 50 gallon	1002	HAYWARD	Y	1/8/2020 12/8/2019 - 2/8/2020

Customer: C00127	Svc Address: "MAIN"	Greg Arrious Ice Cream 6292 Poplar Ave Suite 250 Shelby, TN 38119	Contact 1 Phone 1 901-623-6421 Contact 2 Phone 2		
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM window
DFR 032550342B	Display case freezer 2 section reach-in		HAYWARD	SA	1/9/2020
POL380 4890-24358-2	Walk-in freezer		POLARIS	M	1/6/2020 1/1/2020 - 1/13/2020

7 equipment records included

- **Auto-Creating Work Orders** – Using the PM’s Due function to auto-create, and optionally schedule, work orders for maintenance due is very similar to running the Maintenance Due Report.

The addition of checking the “Create work orders?” checkbox results in ServicePoint prompting for some additional parameters.

The screenshot shows the 'Preventive Maintenance Due' window with the following settings:

- Report mode:** ☒ All PM's within range
- PM date:** 1/1/2020 to 1/30/2020
- Coverage type:** ☒ Contract, ☒ Warranty, ☒ No coverage
- Customer #:** First to Last
- Contract #:** First to Last
- Equipment category:** All
- Zone:** All
- Create work orders?:** ☒ (Check this to automatically create calls for service due equipment)
  - WO open date:** 01/06/2020
  - Service code:** PM
  - Pre-schedule labor?:** ☒
  - Default tech:** \*TBA
  - ☐ Consolidate equipment for the same site onto the same WO?
- Print Report** button

The work order open date is specified, the ServicePoint “Service Code” is chosen, and the user may elect to pre-schedule the work order, placing it on the service schedule calendar. If the user chooses to consolidate by site, all equipment at the same site will be placed on the same work order. Otherwise, an individual work order is opened for each, regardless of location.

The resulting report is displayed below. Notice that the report is similar to the “reporting only” function, with the addition of the work order # opened and assigned to the equipment.

Date: 01/06/20Time: 08:13:56 PM

Air Compressor Supply

Page 1

PREVENTIVE MAINTENANCE DUE REPORT

PM Date range = '1/1/2020 through 1/30/2020'

Coverage types = 'Contract - Yes, Warranty - Yes, No Coverage - Yes'

Contract range = 'First through Last'

Equipment category = 'All'

Zone = 'All'

Customer: 1001

Svc Address: "MAIN"

John Lincoln  
1925 Wondermist Dr.  
  
Memphis, TN 38120

Contact 1

Phone 1 321-455-1864

Contact 2

Phone 2

Model / Serial #

Description

Contract

Warranty

PM Sched

Next PM / PM window

SPA-S  
1000231-398

Bypass Humidifier

HSSPA

Y

2/12/2020  
1/12/2020 - 3/12/2020

\*\* Opened work order # 10730 \*\*

Customer: 1002

Svc Address: EAST

Brian Schmidt - Vacation home  
415 Eastern Avenue  
Unit 3A  
Middle River, MD 21221

Contact 1

Phone 1 321-433-2343

Contact 2

Phone 2 Joe Jones, neighbor  
410-555-9945

Model / Serial #

Description

Contract

Warranty

PM Sched

Next PM / PM window

FSPOOL  
T43014356009

Chiller, Rooftop - 15 ton

FISTAR

M

1/10/2020  
1/5/2020 - 1/17/2020

\*\* Opened work order # 10731 \*\*

H150PE  
105692-2006

Water Heater  
Electric, 42 gallon

HAYWARD

Y

1/10/2020  
12/10/2019 - 2/10/2020

\*\* Opened work order # 10732 \*\*

SRFLT-1  
<none>

Commercial Filter

STARITE

M

1/11/2020  
1/6/2020 - 1/18/2020

\*\* Opened work order # 10733 \*\*

Customer: 1003

Svc Address: "MAIN"

Carol Dawn  
1438 Corporate Lane  
Apt 1A  
Memphis, TN 38118

Contact 1

Phone 1 321-443-5436

Contact 2

Phone 2

Model / Serial #

Description

Contract

Warranty

PM Sched

Next PM / PM window

H150PE  
131000-12001

Water heater  
Electric, 50 gallon

1002

HAYWARD

Y

1/8/2020  
12/8/2019 - 2/8/2020

\*\* Opened work order # 10734 \*\*

Customer: C00127

Svc Address: "MAIN"

Amiable Ice Cream  
6292 Poplar Ave  
Suite 250  
Shelby, TN 38119

Contact 1

Phone 1 Greg  
901-623-6421

Contact 2

Phone 2

Model / Serial #

Description

Contract

Warranty

PM Sched

Next PM / PM window

DFR  
032550342B

Display case freezer  
2 section reach-in

HAYWARD

SA

1/9/2020

\*\* Opened work order # 10735 \*\*

POL380  
4890-24358-2

Walk-in freezer

POLARIS

M

1/6/2020  
1/1/2020 - 1/13/2020

\*\* Opened work order # 10736 \*\*

7 equipment records included

- **Work Order Processing** – The resulting work order for the equipment reviewed above is shown in the following screens. The Predefined Job has been applied, resulting in a list of attached parts, specific task information, and an attached note.

Work Orders, 10731 Brian Schmidt - Vacation home

Work order: **10731** Customer: **1002** Status: **SCHED**  
 Open date: **1/6/2020** Address ID: **EAST** Priority:   
 Time: **8:13 PM** Name: **Brian Schmidt - Vacation home**

General info | Task Detail | Labor | Parts Used | Additional Charges | Images | WQ Summary | Profitability

Task_Seq	Task name	Model ID	Serial #	Description
> 10	Clean and performance test	FSP00L	T43014356009	Chiller, Rooftop - 15 ton

Seq # **10** Task name **Clean and performance test**  
 Model ID **FSP00L** Serial # **T43014356009**  
 Eqp description **Chiller, Rooftop - 15 ton**  
 Location **Northeast rooftop.** ☐ PM ☐ Repair  
 Tag ID   
 Invoicing code  Contract #   
 Service code  Work category   
 Est TTR (hrs)  Labor: 1 Parts: 2  
 Est compl date  Next PM: 1/10/2020 (1/5/2020 - 1/17/2020)

Contract Status: No contract  
 Warranty: FISTAR  
 Active  
 08/01/16 - 08/01/21  
 SPEC

Work Orders, 10731 Brian Schmidt - Vacation home

Work order: **10731** Customer: **1002** Status: **SCHED**  
 Open date: **1/6/2020** Address ID: **EAST** Priority:   
 Time: **8:13 PM** Name: **Brian Schmidt - Vacation home**

General info | Task Detail | Labor | Parts Used | Additional Charges | Images | WQ Summary | Profitability

Pts_Seq	Item_No	Inv_Loc	Description	Qty_Used	Unit_Price
> 10	BIO12993	MAIN	Filter pack 26x26	2.00	27.0000
20	*MISC	MAIN	1.5 Meter Belt	1.00	.0000

Seq # **10** Inventory location **MAIN** Qty used (EACH) **2.00**  
 Item # **BIO12993** Unit price **27.00**  
 Item description **Filter pack 26x26** Discount %   
 Unit cost **27.00** Ext price **54.00**  
 Tax ☐

Seq # **10** Task name **Clean and performance test** Invoicing code   
 Model **FSP00L** Serial **T43014356009** Description **Chiller, Rooftop - 15 ton**



The work order has been placed on the schedule, and drag-and-drop assignment to a specific technician or crew can be done.

**Schedule/Dispatch**

Work order: 
 Date: **1/9/2020**
 Tech: **All**

	Mon 1/6	Tue 1/7	Wed 1/8	Thu 1/9	Fri 1/10	Sat 1/11
<b>*TBA</b>	10736 - Amiable Ice Cream, Shelby, Planned Maintenance, 09:00 AM		10734 - Carol Dawn, Memphis, Planned Maintenance, 09:00 AM		10735 - Amiable Ice Cream, Shelby, Planned Maintenance, 09:00 AM	
<b>ANDERS</b>					10731 - Brian Schmidt - Vacation home, Middle River, Clean and performance test, 10:45 AM	
<b>DOVER</b>						
<b>WILSON</b>			10733 - Brian Schmidt - Vacation home, Middle River, Planned Maintenance, 09:00 AM		10732 - Brian Schmidt - Vacation home, Middle River, Planned Maintenance, 12:00 PM	
<b>ZACH</b>						

**Schedule/Dispatch**

Work order: **10735**
 Date: **1/10/2020**
 Tech: **All**

**Friday, 1/10/2020** ☐ Crew view

	*TBA	ANDERS	DOVER	WILSON	ZACH
09:00 AM	10735 - Amiable Ice Cream, Shelby, Planned Maintenance, 09:00 AM				
09:30 AM					
10:00 AM					
10:30 AM					
11:00 AM					
11:30 AM					
12:00 PM					
12:30 PM					
1:00 PM					
1:30 PM					
2:00 PM					
2:30 PM					
3:00 PM					
3:30 PM					

Address: 6292 Poplar Ave  
 Shelby TN  
 Map grid: Fulton Place shopping cen  
 Map note: Preventive maintenance d

Interval:  
☐ 1 hour  
☒ 30 min  
☐ 15 min

Seq # **10**  
 Tech ID **\*TBA**  
 To be assigned  
 Work description:

☒ Reg  
☐ OT  
☐ Spec  
☐ NC

Hrs to bill:  90.00  
 Ext price:  0.00

Tax: ☒

Schedule: 1/10/2020 9:00 AM  
 Dispatch:   
 Start:   
 Stop:   
 Return:

**Clock in/out**

- **SP Mobile App** – Any work order that is put onto the ServicePoint schedule in the desktop software is automatically available in the mobile app. Techs may clock in or out, enter parts used, add notes, capture images with their mobile device, and collect a signature to complete the work order. The captured signature, images, and information entered by the technician are added to the work order in the desktop database in real time. This allows monitoring of technician activity by management.

Sample mobile screens, represented in an iPhone sized screen, are included below.



