## ServicePoint Equipment Maintenance Scheduling

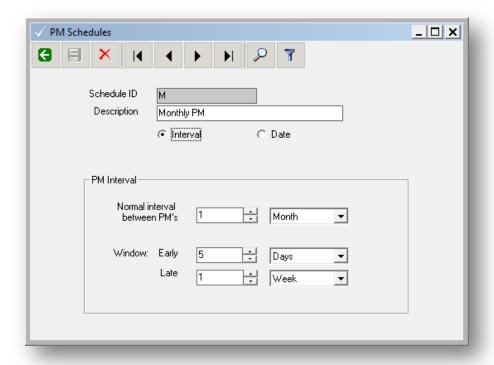
This document has been written to describe the features of the ServicePoint Planned Maintenance functionality. These features have been designed to allow tracking and scheduling of recurring maintenance of customer equipment.

## **Setup Options**

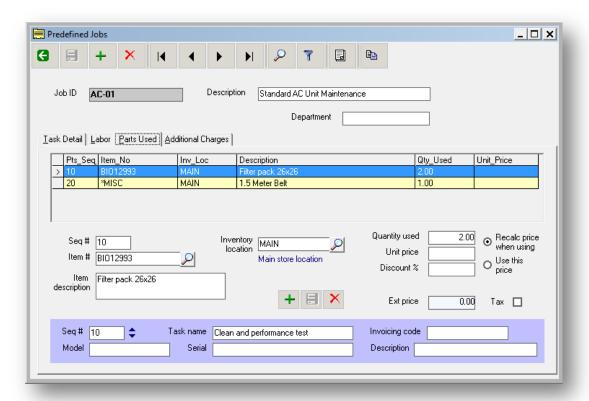
• **PM Schedules** – PM Schedules (Planned Maintenance) specify the normal interval of time between preventive maintenance of equipment. These schedules are assigned to equipment for use in reporting upcoming maintenance due, and also for automatically opening work orders for maintenance due.

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.



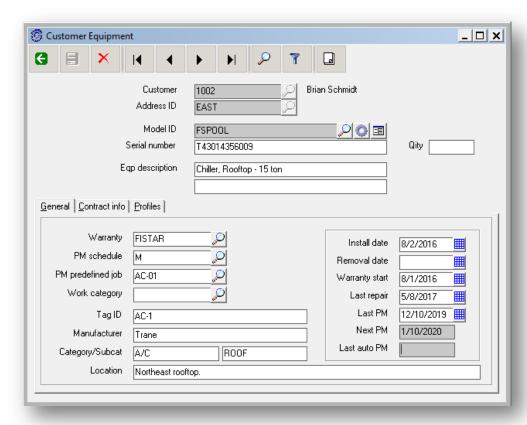
• **Predefined Jobs** – Optionally, Predefined Jobs may be defined that are work order "templates" to be applied when a work order is created for a specific type of equipment. A predefined job may contain one or more tasks, each with a predetermined amount of labor time assigned, and a list of required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



## **Operational usage and functionality**

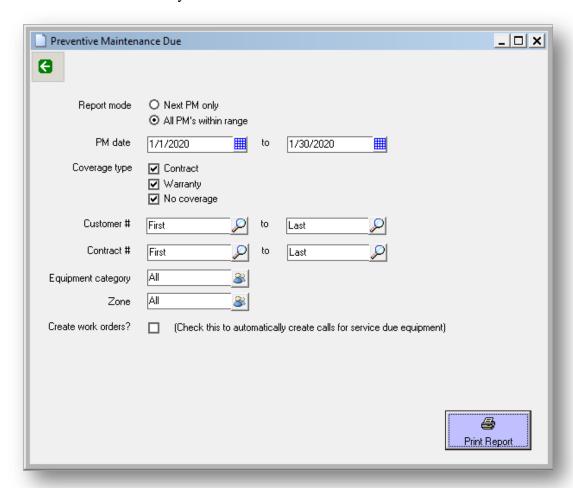
 Customer Equipment – When customer equipment is defined in ServicePoint, the schedule frequency of maintenance is specified by naming the desired PM Schedule.

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.



• 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.

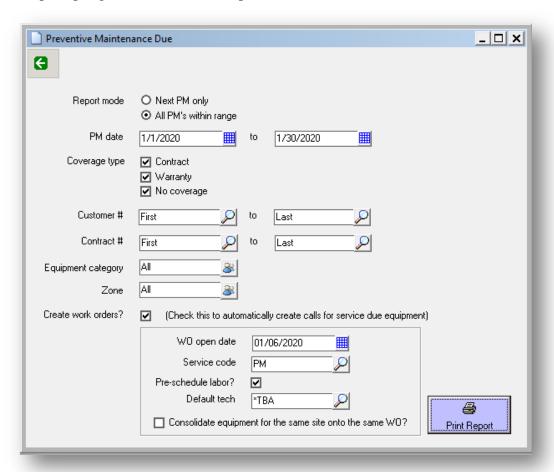


The resulting report is displayed in the below screenshot. Note that equipment with differing intervals is included, as long as they meet the entered selection criteria.

te: 01/06/20 Time: 0	7:56:04 PM	Air Compressor Supply			Page 1
	PREVENTIVE	MAINTENAN	CE DUE	REPORT	
Date range = '1/1/202 verage types = 'Contra ntract range = 'First uipment category = 'Al ne = 'All'	ct - Yes, Warranty - Yes, through Last'	No Coverage - Yes'			
Customer: 1001	Svc Address: "MAIN"	John Lincoln 1925 Wondermist Dr Memphis, TN 2812		Contact 1 Phone 1 Contact 2 Phone 2	321-455-1864
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM windo
SPA-S 1000231-398	Bypass Humidifier		HSSPA	¥	2/12/2020 1/12/2020 - 3/12/2020
Customer: 1002	Svc Address: EAST	Brian Schmidt - Va 415 Eastern Avenue Unit 3A Middle River, MD		Phone 1	Brian Schmidt 321-433-2343 Joe Jones, neighbor 410-555-9945
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM winds
FSPOOL T43014356009	Chiller, Rooftop	- 15 ton	FISTAR	н	1/10/2020 1/5/2020 - 1/17/2020
H150PE 105692-2006	Water Heater Electric, 42 gall	on	HAYWARD	¥	1/10/2020 12/10/2019 - 2/10/202
SRFLT-1 <none></none>	Commercial Filter		STARITE	м	1/11/2020 1/6/2020 - 1/18/2020
Customer: 1003	Svc Address: "MAIN"	Carol Dawn 1438 Corporate Lan Apt 1A Memphis, TN 3811		Contact 1 Phone 1 Contact 2 Phone 2	321-443-5436
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM windo
H150PE 131000-12001	Water heater Electric, 50 gall	1002 on	HAYWARD	Y	1/8/2020 12/8/2019 - 2/8/2020
Customer: C00127	Svc Address: "MAIN"	Greg Aerious Ice C 6292 Poplar Ave Suite 250 Shelby, TN 38119		Contact 1 Phone 1 Contact 2 Phone 2	Greg 901-623-6421
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM winds
DFR 03255034ZB	Display case free 2 section reach-i		HAYWARD	SA	1/9/2020
POL380 4890-24358-2	Walk-in freezer		POLARIS	н	1/6/2020 1/1/2020 - 1/13/2020
	ent 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.



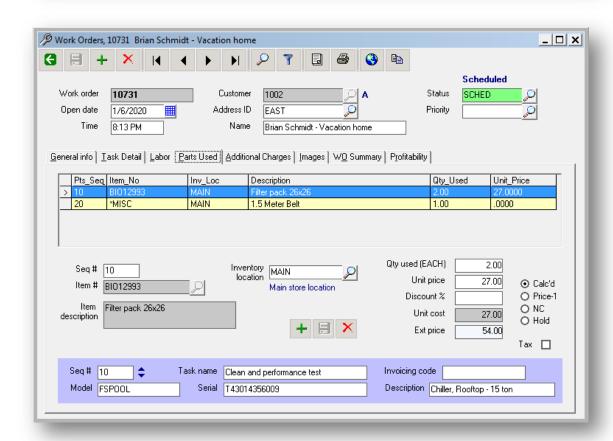
The work order open date is specified, the ServicePoint "Service Code" is chosen, and the user may elect to pre-schedule the work order, placing it on the service schedule calendar. If the user chooses to consolidate by site, all equipment at the same site will be placed on the same work order. Otherwise, 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.

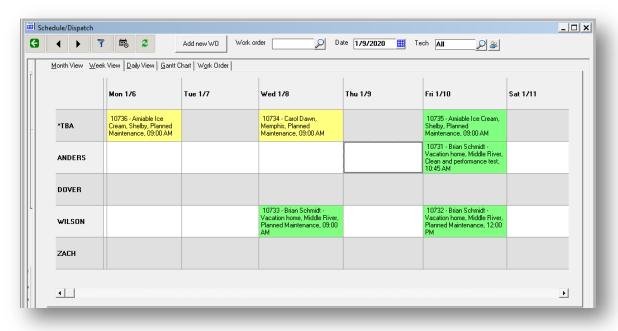
te: 01/06/20 Time:	08:13:56 PM	Air Compressor Supp	ly		Page 1
	PREVENTIV	E MAINTENAN	CE DUE	REPORT	
		s, No Coverage - Yes'			
Customer: 1001	Svc Address: "MAIN"	John Lincoln 1925 Wondermist Dr.		Contact 1 Phone 1 Contact 2	321-455-1864
		Memphis, TN 381	Memphis, TN 38120		
Model / Serial 6	Description	Contract	Warranty	PM Sched	Next PM / PM windo
SPA-S 1000231-398	Bypass Humidifie	r	HSSPA	¥	2/12/2020 1/12/2020 - 3/12/2020
	** Opened work	** Opened work order # 10730 **			
Customer: 1002	Svc Address: EAST	Brian Schmidt - V 415 Eastern Avenu Unit 3A		Phone 1	Brian Schmidt 321-433-2343
		Middle River, MD	21221	Phone 2	Joe Jones, neighbo: 410-555-9945
Model / Serial f	Description	Contract	Warranty	PM Sched	Next PM / PM windo
PSPOOL T43014356009	Chiller, Rooftop	- 15 ton	FISTAR	м	1/10/2020 1/5/2020 - 1/17/2020
	** Opened work of	order # 10731 **			
H150PE 105692-2006	Water Heater Electric, 42 gal	lon	HAYWARD	¥	1/10/2020 12/10/2019 - 2/10/202
	** Opened work	order # 10732 **			
SRFLT-1 <none></none>	Commercial Filte	r	STARITE	м	1/11/2020 1/6/2020 = 1/18/2020
	** Opened work	order # 10733 **			
ustomer: 1003	Svc Address: "MAIN"	Address: "MAIN" Carol Dawn 1438 Corporate Lane Apt 1A Memphis, TN 38118		Contact 1 Phone 1 Contact 2 Phone 2	321-443-5436
Model / Serial #	Description	Contract	Warranty	PM Sched	Next PM / PM windo
H150PE 131000-12001	Water heater Electric, 50 gal	1002 lon	HAYWARD	Y	1/8/2020 12/8/2019 - 2/8/2020
	** Opened work	order # 10734 **			
ustomer: C00127	Svc Address: "MAIN"	Amiable Ice Cream 6292 Poplar Ave Suite 250 Shelby, TN 3811		Contact 1 Phone 1 Contact 2 Phone 2	Greg 901-623-6421
Model / Serial f	Description	Contract	Warranty	PM Sched	Next PM / PM windo
DPR 03255034ZB	Display case fre 2 section reach-		HAYWARD	SA	1/9/2020
	** Opened work	order # 10735 **			
POL380 4890-24358-2	Walk-in freezer		POLARIS	м	1/6/2020 1/1/2020 - 1/13/2020
	** Opened work	order # 10736 **			
	pment records included				

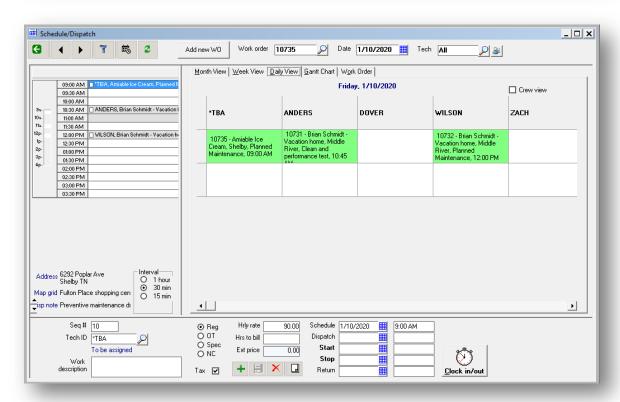
• Work Order Processing – The resulting work order for the equipment reviewed above is shown in the following screens. The Predefined Job has been applied, resulting in a list of attached parts, specific task information, and an attached note.

/ Work Orders, 1	0731 Brian Schmidt - Vacation	n home			_ _ ×		
<b>G =</b> +	×	N / 7	] 😂 🕓 🗈				
Į.	10131	stomer 1002 ress ID EAST			SCHED D		
	8:13 PM	Name Brian Schmidt -	Vacation home	1 noney	<u>&amp;</u>		
<u>G</u> eneral info <u>T</u> a:	General info   Iask Detail   Labor   Parts Used   Additional Charges   Images   WD Summary   Profitability						
Task_Seq	Task name	Model ID	Serial #	Description			
> 10	Clean and performance test	FSPOOL	T43014356009	Chiller, Roo	oftop - 15 ton		
Seq#	10 Task name	Clean and performance t	est	<u> </u>	Contract Status		
Model ID	FSPOOL P	No contract					
Eqp description	Chiller, Rooftop - 15 ton						
Location	Northeast rooftop.		□ PM	I	Warranty: FISTAR		
Tag ID			□ Re	pair	Active 08/01/16 - 08/01/21		
Invoicing code	2	Contract #			SPEC		
Service code		rk category	$\sim$		+ = × •		
Est TTR (hrs)		Labor: 1 Pa	rts: 2				
Est compl date		Next PM: 1/10/202	0 (1/5/2020 - 1/17/2020	))	3 2		



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





• **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.





