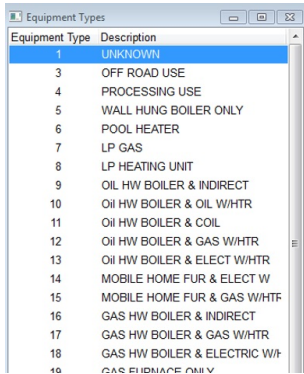


# EnergyService Equipment

Last Modified on 06/09/2022 2:07 pm EDT

## Equipment Types

This is to indicate the type of Equipment (or description of equipment) being serviced.

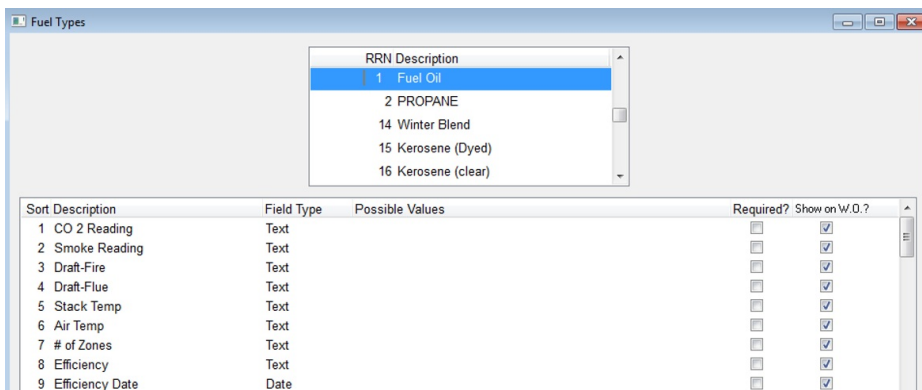


Equipment Type	Description
1	UNKNOWN
3	OFF ROAD USE
4	PROCESSING USE
5	WALL HUNG BOILER ONLY
6	POOL HEATER
7	LP GAS
8	LP HEATING UNIT
9	OIL HW BOILER & INDIRECT
10	OIL HW BOILER & OIL W/HTR
11	OIL HW BOILER & COIL
12	OIL HW BOILER & GAS W/HTR
13	OIL HW BOILER & ELECT W/HTR
14	MOBILE HOME FUR & ELECT W
15	MOBILE HOME FUR & GAS W/HTR
16	GAS HW BOILER & INDIRECT
17	GAS HW BOILER & GAS W/HTR
18	GAS HW BOILER & ELECTRIC W/HTR
19	GAS FIREPLACE ONLY

1. From the *EnergyService* menu, select **Equipment**.
2. Choose **Equipment Types** and press **Ctrl+C** to create.
3. The *Equipment Type* code will automatically be assigned once saved.
4. Enter a *Description* and press the **Down Arrow** or **F4** to create new line.
5. Press **Ctrl+Q** to save.

## Fuel Types

If the type of equipment being serviced uses a Fuel Type such as Propane or Fuel Oil, enter a Fuel Type to tie to the equipment.



Sort	Description	Field Type	Possible Values	Required?	Show on W.O.?
1	CO 2 Reading	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Smoke Reading	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Draft-Fire	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Draft-Flue	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Stack Temp	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Air Temp	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	# of Zones	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Efficiency	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Efficiency Date	Date		<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. From the *EnergyService* menu, select **Equipment**.
2. Choose **Fuel Types** and press **Ctrl+C** to create.
3. *RRN* will be automatically assigned once saved.
4. Enter the Fuel Type *Description*.
5. In the bottom portion, enter the information related to the Fuel Type.

## Sort/Description Table

1. Press **Ctrl+C** to create.
2. The *Sort* number will be automatically assigned.
3. Enter a *Description*.
4. Select the *Field Type* from the drop-down (*Date, Time, Checkbox, Choices, Text*).
5. Enter *Possible Values*.
6. Check the *Required?* option if this item is required to be filled out when setting the Equipment on the customer.
7. Check the *Show on W.O.?* to show this information on the Service Order.
8. Press **Ctrl+Q** to save.
9. Do this for each Fuel Type. Press the **Down Arrow** or **F4** to add a new line.

## Equipment

Equipment can consist of items being sold or what is present at a customer site being serviced.

Below is where the Equipment Types, Fuel Types, and Related Parts will be tied.

RRN Description	Type	Equipment Type Description	Warranty	Fuel Type	Fuel Type Description
1.080 HEATING SYSTEM	1	UNKNOWN	<input checked="" type="checkbox"/>	1	Fuel Oil
1.081 HW BOILER & OIL W/HTR	10	Oil HW BOILER & OIL W/HTR	<input type="checkbox"/>	1	Fuel Oil
1.082 HW BOILER & COIL	11	Oil HW BOILER & COIL	<input type="checkbox"/>	1	Fuel Oil
1.083 HW BOILER GAS W HTR	12	Oil HW BOILER & GAS W/HTR	<input type="checkbox"/>	1	Fuel Oil
1.084 HW BOILER & ELECT W HTR	13	Oil HW BOILER & ELECT W/HTR	<input type="checkbox"/>	1	Fuel Oil
1.085 STEAM BOILER & OIL W HTR	30	STEAM BOILER & OIL W/HTR	<input type="checkbox"/>	1	Fuel Oil

Sort Description	Field Type	Possible Values	Required?	Show on W.O.?
1 BOILER/FURNACE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 BURNER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3 POWER VENTER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 FUEL FILTER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 SMOKE PIPE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 THERMOSTAT	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 NOZZLE SIZE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 PRIMARY CONTROL	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 HW HEATER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 ZONE VALVE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 EXPANSION TANK	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 CIRCULOVER MTR	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 AIR FILTER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 RANGE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 DRYER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
16 SERVICE CONTRACT	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
17 SEPERATE WATER HTR	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>

CO 2 Reading  Stack Temp  Efficiency Date   
 Smoke Reading  Air Temp   
 Draft-Flue  # of Zones   
 Draft-Flue  Efficiency

The top section will cross-reference the *Description* with the Equipment and Fuel Type.

RRN Description	Type	Equipment Type Description	Warranty	Fuel Type	Fuel Type Description
1.080 HEATING SYSTEM	1	UNKNOWN	<input checked="" type="checkbox"/>	1	Fuel Oil
1.081 HW BOILER & OIL W/HTR	10	Oil HW BOILER & OIL W/HTR	<input type="checkbox"/>	1	Fuel Oil
1.082 HW BOILER & COIL	11	Oil HW BOILER & COIL	<input type="checkbox"/>	1	Fuel Oil
1.083 HW BOILER GAS W HTR	12	Oil HW BOILER & GAS W/HTR	<input type="checkbox"/>	1	Fuel Oil
1.084 HW BOILER & ELECT W HTR	13	Oil HW BOILER & ELECT W/HTR	<input type="checkbox"/>	1	Fuel Oil
1.085 STEAM BOILER & OIL W HTR	30	STEAM BOILER & OIL W/HTR	<input type="checkbox"/>	1	Fuel Oil

1. From the *EnergyService* menu, select **Equipment**.
2. Choose **Equipment** press **Ctrl+C** to create.
3. *RRN* will be automatically assigned once saved.
4. Enter the *Description* of the Product (this can be the same as the *Equipment Type*).
5. Press **F5** to select the *Type* of Equipment.
6. Check the *Warranty* option if this item is under warranty.

7. Press **F5** to select the Fuel Type related to this piece of Equipment.

Note: If selling a water heater for propane and for fuel, both types will need entered.

8. Press **Ctrl+Q** to save.

The bottom section will link the possible parts related to a piece of equipment cutting down on the number of times the same information needs entered.

Sort	Description	Field Type	Possible Values	Required?	Show on W.O.?
1	BOILER/FURNACE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	BURNER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	POWER VENTER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	FUEL FILTER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	SMOKE PIPE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	THERMOSTAT	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	NOZZLE SIZE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	PRIMARY CONTROL	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	HW HEATER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	ZONE VALVE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
11	EXPANSION TANK	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
12	CIRC/BLOWER MTR	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
13	AIR FILTER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
14	RANGE	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	DRYER	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
16	SERVICE CONTRACT	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>
17	SEPERATE WATER HTR	Text		<input type="checkbox"/>	<input checked="" type="checkbox"/>

CO 2 Reading	<input checked="" type="checkbox"/>	Stack Temp	<input checked="" type="checkbox"/>	Efficiency Date	<input checked="" type="checkbox"/>
Smoke Reading	<input checked="" type="checkbox"/>	Air Temp	<input checked="" type="checkbox"/>		
Draft-Fire	<input checked="" type="checkbox"/>	# of Zones	<input checked="" type="checkbox"/>		
Draft-Flue	<input checked="" type="checkbox"/>	Efficiency	<input checked="" type="checkbox"/>		

Exit

1. Press **Ctrl+C** to create.

2. *Sort* will be automatically assigned once saved.

3. Enter a *Description* of parts related to equipment to be installed.

4. Select the *Field Type* from the drop-down list (*Date, Time, Checkbox, Choices, Text*).

5. Under *Possible Values*, enter the options available when selecting this piece of equipment.

6. Check *Required?* if this part is required for this piece of Equipment.

7. Check *Show on W.O.?* to show this part on the Service Work Order.

8. Repeat these steps for each piece of equipment.

**Note:** In the bottom section, the options set up under *Fuel Types* will now be included for this piece of Equipment and related parts.