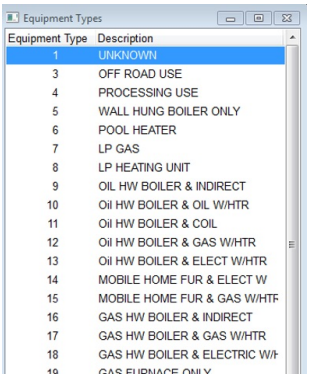
EnergyService Equipment

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

Equipment Types

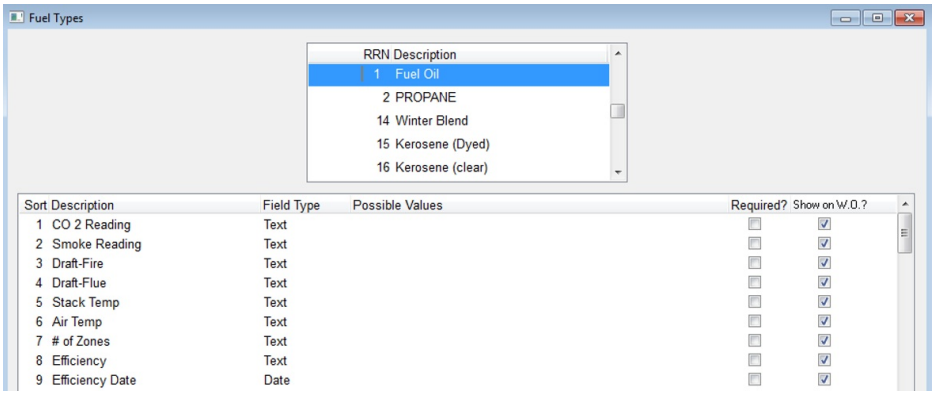
This is to indicate the type of Equipment (or description of equipment) being serviced.



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.



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.

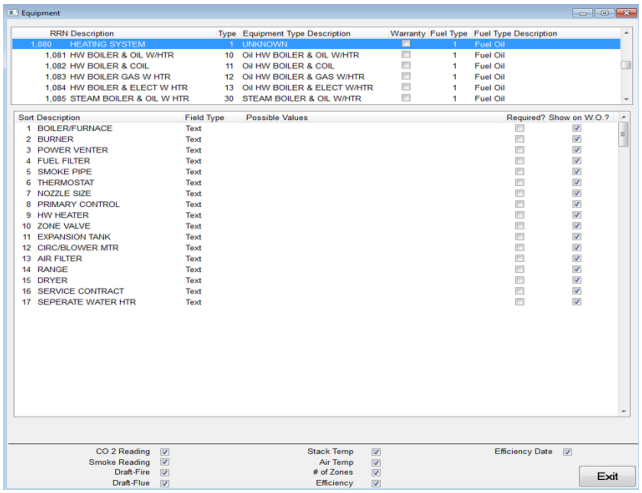
Sort/Description Table

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.

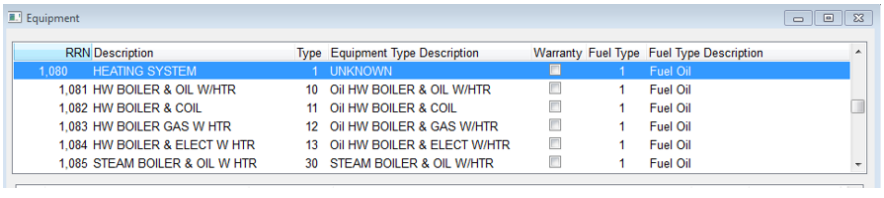
Equipment

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.



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



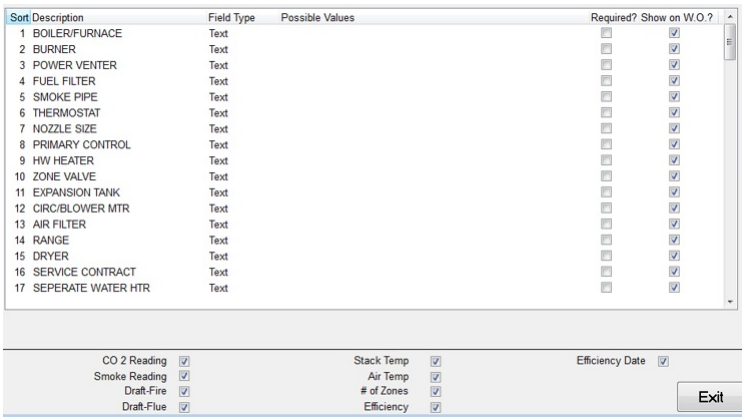
1. From the *EnergyService* menu, select **Equipment**.
2. Choose **Equipment** press **Ctrl+C** to create.
3. *RRN* will be automatically assigned once saved.
4. Enter the *Description* of the Product (this can be the same as the*Equipment Type*).
5. Press **F5** to select the *Type* of Equipment.
6.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



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.