

# Preventive Maintenance

**PM Schedule Maintenance**

sa Fabrikam, Inc. 1/1/2010

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PM Schedule ID: PM001 PM Schedule 001

PM Service Type: PM001 Preventive Maintenance 001

PM Service Item	Type	Interval	Quantity 1	Frequency 1	Quantity 2	Frequency 2
SVC001	Fixed	At		3 Month(s)		
Service Item 001			3,000	Clicks - Meter 1		
SVC002	Fixed	At		6 Month(s)		
Service Item 002			6,000	Clicks - Meter 1		
SVC003	Fixed	At		9 Month(s)		
Service Item 003			9,000	Clicks - Meter 1		
SVC004	Fixed	At		12 Month(s)		
Service Item 004			12,000	Clicks - Meter 1		
			0			
			0			

by Schedule ID PM = Preventive Maintenance

## PM Schedule Maintenance

- Assign the PM schedule to a covered item with customer override.
- Attach a service type to use as the default for PM service orders.
- Option to specify a default division for generated PM orders.
- Specify billing method as fixed fee, time & materials, or non-billable.
- Allow partial billing with service item back order processing.
- Assign a document workflow routing with in-process holds.
- Specify document formats by branch, service type, or customer.
- Option to suppress all invoices or zero invoices only.
- Service levels with priority management and late-response alerts.
- Rate adjustments by type, resource, price level, amount or percent.
- Trade discount and miscellaneous charge by amount or percent.
- Option to override default GL distribution accounts.
- Unlimited service events by type, interval, quantity and frequency.
- Service events are created using the specified PM service item.
- Event is triggered by the earlier of Frequency 1 or Frequency 2.
- Fixed type event is scheduled using the item's in-service date.
- Variable type event is scheduled using the item's last service date.
- Support for one-time, recurring, or seasonal service events.
- Record level notes for PM schedule, service type, and service item.
- Drill-down support for PM schedule, service type and service item.
- Window level notes, online help, and sorted browser.

**Service Item Maintenance**

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Item Number: SVC001 Minimum Charge: \$0.00

Description: Service Item 001 Maximum Charge: \$0.00

Billing Method: Time & Materials

Branch ID: Division ID: Category: SC001

Resource Type	Item Number	U of M	Quantity	Unit Cost	Extended Cost
Materials	Description				
Vehicles	MAT001	Each	1	\$50.00	\$50.00
Technicians	MAT002	Each	2	\$100.00	\$200.00
Tools	MAT003	Each	3	\$150.00	\$450.00
Teams			0.00	\$0.00	\$0.00
Miscellaneous					

Confirm Service Tasks Tasks Certifications Accounts

by Item Number

## PM Service Item

- Option to restrict the service item to a specific branch or division.
- Specify billing method as fixed fee, time & materials, or non-billable.
- Ability to set minimum and maximum charge for specified service.
- Categorize service item for use in filtering lookups and reports.
- Specify default resource quantities, units of measure, and costs.
- Set default tasks with unlimited text & estimated time to complete.
- Indicate if tasks must be confirmed before service completion.
- Assign skills and certifications required to perform the service.
- Option to override default GL distribution accounts.
- Can link to a contract line with coverage percentages and limits.
- Support for contract coverage exceptions by resource type.
- Support for optional coverage schedule by day, time, & exceptions.
- Utilizes contract service type as the default for PM service orders.
- Print service item lists including resources or tasks.
- Record level notes for the item, branch, division and category.
- Drill-down support for the service item, branch, division & category.
- Window level notes, online help, and sorted browser.

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