

Equipment Module – Quick Start Guide - Recording Maintenance/Repairs

This QSG details how to record a Repair and/scheduled Maintenance on a single piece of equipment.

Recording Maintenance/Repairs

<i>Locate the Equipment</i>	Perform an Equipment Search using the barcode, model name/number, or keyword.
<i>Select the proper unit</i>	Click on the barcode number to get the “Equipment Info” page.
<i>Go to Log page</i>	On the left hand menu select “Add Scheduled Maintenance/Repair Log”
<i>Select from Maintenance Schedule List.</i>	All Maint. Schedules will be selected by default, Un-Check the Maintenance Types that you are not performing. Use “Select All” if you are not doing Sched. Maint.
<i>Select “Unscheduled Maintenance and Repairs” tab</i>	Using the dropdown box select the necessary repair. If it is not listed you will need to add it before recording the repair. <i>Please see “Adding Maintenance Type” below.</i>
<i>Required Items</i>	The “Performed Date” and “Serviced By” are the only required fields
<i>Add Cost information</i>	Enter the cost data and Service Invoice info – if any (See Service Invoice QSG for details on Service Org & Invoices)
NOTE: Before saving the information, check that only the desired Maintenance Types are selected. The system defaults to selecting ALL Maintenance Types.	
<i>Save Repair info</i>	Press the Save button
<i>Review Repair Log</i>	You should see “Add is Successful” and a list of the Maint/Repairs for the equipment.

Adding Maintenance Type

<i>Go to “Maintenance Types”</i>	Under the “Administration” tab select “Maintenance Types”
<i>Add new type</i>	Select “Add Maintenance Type” link at top of page
<i>Required Items</i>	The “Name” and “Maintenance Type Group” are the only required fields
<i>Enter new information</i>	Enter the name, a description (if needed), and select a “Maintenance Type Group” NOTE: “Repairing” makes the most sense for one-time repairs.
<i>Add new type</i>	Press the “Add” button; Currently you do not see the “Add is Successful” message.

Related Quick Start Guides

- Equipment Search
- Service Organizations and Invoices