

Equipment Module – Quick Start Guide - Service Organizations & Invoices

This QSG details how to add a Service Organization and related Invoices. In order to properly record Maintenance and Repair activities and costs, you will need to designate a Service Organization. Once that company is in the system it's relatively easy, however you may need to add a Service Organization at some time. The steps below will help you do that.

This QSG assumes that you have already selected the equipment and the appropriate maintenance and/or repairs (Please see the QSG on Recording Maintenance/Repairs)

Select a Service Organizations & Invoice

These steps start on the "Add Scheduled Maintenance Log" page (open this page from the link in the left sidebar menu on the Equipment Info page)

<i>Attach an Invoice to the repair</i>	There are two options to do this depending on whether the invoice has already been added to the system.
<i>Invoice is IN the system</i>	Click on "Pick Service Invoice" and locate the invoice by either number or company name.
<i>Invoice is NOT IN the system</i>	To add the invoice you will need to select an organization first.
<i>Select a Service Organization</i>	Use the "Pick Organization" link to open the popup window, type the company name and select from the listing. If the Organization is not listed follow the steps for Adding a Service Organization below.
<i>Add the new invoice</i>	After selecting the company, click on the "Add Service Invoice" and new entry fields will appear.
<i>Add invoice details</i>	Fill in the required fields: Invoice Number, Date, and Cost, and any additional fields that are necessary.
<i>Select the location(optional)</i>	Use the drop down menu, or select "Add New Address" link
NOTE: Before saving the information, check that only the desired Maintenance Types are selected. The system defaults to selecting ALL Maintenance Types.	
<i>Save the Service Information</i>	Press the "Save" button at the bottom. NOTE: This will save the invoice and service company info as well as the actual Repair or Scheduled Maintenance information – Check that all fields are filled in correctly.
<i>You are finished</i>	If you get the "Add is Successful" message

Add Service Organizations

<i>Go to "Company/Organizations"</i>	Under the "Administration" tab select "Company/Organizations"
<i>Go to the Add screen</i>	Click on the "Add Organization" link at the top
<i>Add the necessary information</i>	Fill in the required fields: Name, Address, City, and Zip Code, and any additional fields that are necessary. NOTE: Since companies often have multiple names and offices, enter enough information to make the new entry as specific as possible.
<i>Save the new company/organization</i>	Press the "Add" button when you have filled in the necessary information.
<i>You are finished</i>	If you get the "Add is Successful" message

Related Quick Start Guides

- Equipment Search
- Recording Maintenance/Repairs