

# Equipment Servicing

Keeping track of all the important information about your equipment, customer equipment, equipment returned to the manufacturer, and equipment currently under repair is a demanding task. Equipment is constantly on the move and changing. A great way to keep control of your equipment is with SouthWare's Equipment Servicing.

S O U T H W A R E   E X C E L L E N C E   S E R I E S   >

## BENEFITS

### SERVICE MANAGEMENT

The screenshot displays a software window titled "Maintain Customer Equipment Info". It contains two main sections: "SERVICE" and "BILLING".

**SERVICE Section:**

- 1. Contract #
- 2. Line #
- 3. Equip ID
- 4. Serial #
- 5. Location
- 6. In Service (Start/End dates)
- 7. Priority
- 8. Travel Miles
- 9. Service Territory
- 10. Service Tag ID #
- 11. Previous Maint.
- 12. Mfr. Repairs
- 13. S/O History
- 14. Parts
- 15. Labor
- 16. Mfr. Repairs
- 17. S/O History

**BILLING Section:**

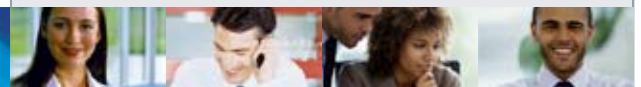
- 18. Contract Value
- 19. Base Price
- 20. Comment

Buttons: OK, Cancel

Customer Equipment Record

- Know the detailed service history for each piece of equipment you service
- Know the warranty dates on each piece of equipment you sell so you can bill service work accurately and know when to offer a service contract
- Keep track of a piece of equipment as it moves between customers or contracts
- Automatically schedule preventive maintenance service work on equipment that is under contract
- Price your service contracts based on rates per piece of equipment on the contract
- Instantly know whether a piece of equipment is covered by a service contract
- Make sure you propose a service contract on every piece of equipment you sell
- Keep track of metered usage on certain equipment
- Know the profitability and repair history of each model of equipment you service

Equipment Servicing handles the equipment tracking functions for SouthWare's Service Management Series, a complete system for service businesses. With Equipment Servicing you get thorough equipment records so you can provide great service and get paid for your service.



## Features & Functionality

### Standard Equipment Model Features

- Extensive standard information
- Manufacturer info
- Standard preventive maintenance schedules
- General warranty periods and warranty periods for up to 10 components
- Skills/training needed for servicing
- Contract pricing

### Customer Equipment Features

- Track by serial #, tag #, or system
- Specific warranty dates based on model
- Sales information
- Loan, rent, out-of-service indicator
- Complete contract history
- Contract pricing information
- Complete history of service orders
- Meter reading history
- Billing, cost, and profit information
- Notes and optional Extended Data

### Preventive Maintenance Features

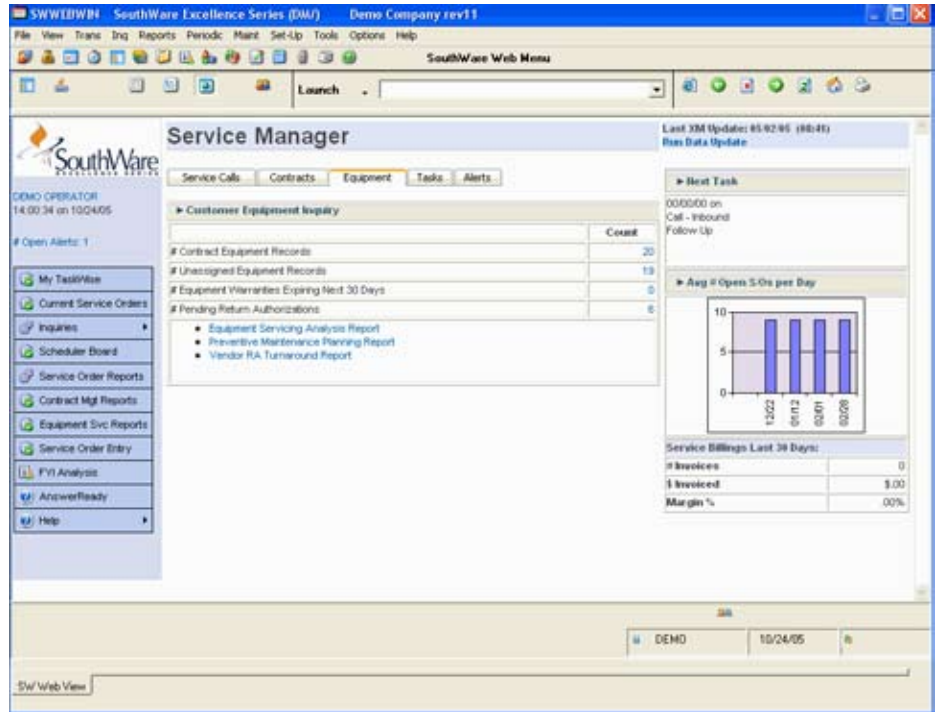
- Up to 10 schedules per equipment model
- Based on time elapsed or metered usage
- Generate PM service orders for equipment

### Meter Readings

- Option per equipment model
- Contract billing provides for base units and rate table for excess usage
- Unlimited history of meter readings
- Record initial, actual, or estimated readings

### Interface with Return Authorizations module

- Track returns for credit, repair, exchange, warranty work
- Internal or customer-owned equipment



Service Manager Portal

### Integration with Contracts and Service Orders

- Link to contracts and service orders
- Contract billing, service warranties

### Interface from Inventory/Sales

- Automatically create service records for sold equipment
- Interface with parts Inventory, Purchasing

### Equipment Servicing can help you answer such questions as:

- What equipment is under service contract to this customer?
- What warranties will expire next month on equipment that we've sold so we can offer service contracts?
- Which equipment models have had a poor reliability factor over the last 12 months?
- Do we have the parts we need to do the preventive maintenance scheduled for next week?

- Didn't we have this same problem with this piece of equipment a couple of months ago?
- How many excess units did we bill on this copier last quarter?
- Are we still waiting on an exchange unit to finish this service order?
- Which customer equipment records are not currently covered under a service contract?
- Is the fan in this unit still under warranty?

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