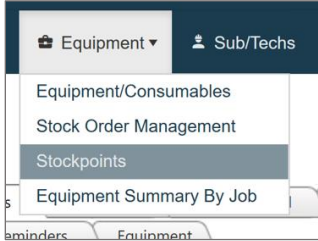


Equipment Setup

This document will provide a review of how to enter equipment into the Restoration Manager. This function may be performed by a user.

Go to Equipment → Stockpoints ***Stockpoints are created to house the equipment during the time that the equipment is not in use*



To add a Stockpoint click on the 'Add' icon.

Name	Category	Estimator	Project Manager	Address	Vehicle_ID	Status
MidWest Warehouse	Location	Lisa Paris		16748 N Ewing Road, Ewing, IL 62836		Active
MidWest Warehouse STR	Location			16748 N Ewing Road, Ewing, IL 62836 United States		Active
Sunshine Restoration Warehouse	Location			Ocean Drive South, Jacksonville Beach, FL 32250		Active
Truck #7	Vehicle	Ken A. Davenport	Rob Code		841	Active
Truck 2	Vehicle					Active
Warehouse #1	Location					Active

Page size: 6 | 8 items in 2 pages

+

Location Stockpoint, enter the requested information for a *location*.

Name **Required*

Status: Active or Inactive

**Required*

Type: Location **Required*

Address, City, State, Zip &

Country **Required*

Phone **Optional*

Email **Optional*

PO Allowed **Optional* –
Consumables

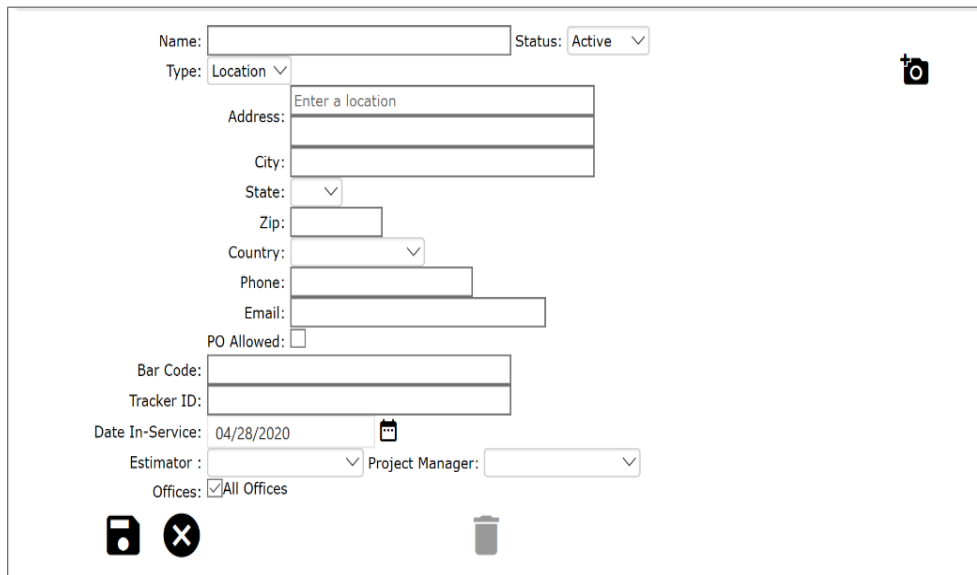
Bar Code **Optional*

Tracker ID **TechLoc Integration*
Only


Date In-Service **Optional*

Estimator/Project Manager
**Optional*

Offices **Required* – Office selection required, uncheck to select individual offices. Click once to highlight office, CTRL-Click to highlight multiples.



Name: Status: Active ▾

Type: Location ▾ 

Address:

City:

State: ▾

Zip:

Country: ▾


Phone:

Email:

PO Allowed:




Bar Code:

Tracker ID:

Date In-Service: 04/28/2020 

Estimator: ▾ Project Manager: ▾

Offices: All Offices

Picture option is available, click on the 'Add Photo' icon to include a picture on the Stockpoint.



Click the 'Save' icon to save the Stockpoint detail information.





Equipment Setup

Vehicle Stockpoint, enter the requested information for a *vehicle*.

Name **Required*

Type: Vehicle **Required*

ID **Optional*

VIN **Optional*

Manufacturer **Optional*

Model **Optional*

Year **Optional*

Bar Code **Optional*

Tracker ID **TechLoc Integration Only*

Date In-Service **Optional*

Estimator/Project Manager

**Optional*

Offices **Required – Office selection required, uncheck to select individual offices. Click once to highlight office, CTRL-Click to highlight multiples.*

The screenshot shows a web form for 'Equipment Setup'. It includes the following fields and controls:

- Name: Text input field
- Status: Dropdown menu with 'Active' selected
- Type: Dropdown menu with 'Vehicle' selected
- ID: Text input field
- VIN: Text input field
- Manufacturer: Text input field
- Model: Text input field
- Year: Text input field
- Bar Code: Text input field
- Tracker ID: Text input field
- Date In-Service: Text input field with '04/28/2020' and a calendar icon
- Estimator: Dropdown menu
- Project Manager: Dropdown menu
- Offices: Checkboxes, with 'All Offices' checked
- Bottom row of icons: Save (floppy disk), Cancel (X), and Delete (trash can)
- Top right corner: Add Photo icon (camera with plus sign)

Picture option is available, click on the 'Add Photo' icon to include a picture on the Stockpoint.



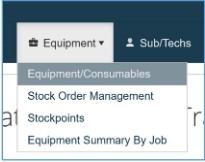
Click the 'Save' icon to save the Stockpoint detail information.



Equipment Setup

Once the Stockpoints are created Equipment may be entered into the database.

Go to Equipment → Equipment/Consumables



To enter equipment, ensure the 'Viewable' is marked as Equipment. Then click the 'Add' icon.

Equipment / Consumables

Viewable By: Equipment Consumables

Availability: Overdue Only Due Today Only Needs Service Only

*Click and drag, or ctrl-click to select multiple rows for assignment.

Name	Bar Code	Class	In	Billing	Job Name	Job Id	Start	Due
Air Dryer	1234	Air Mover	<input checked="" type="checkbox"/>	Flat				
Air Dryer	AD21		<input type="checkbox"/>	Flat	Shaun Ryder	RM19-0006-COH	04/16/2020	04/1
Air Mover	38	Air Mover	<input type="checkbox"/>	Flat	Sammy Black	RM19-000M.D	04/16/2020	04/1
Air Mover	317	Air Mover	<input type="checkbox"/>	Flat	Sammy Black	RM19-000M.D	04/16/2020	04/1
Air Mover	12345		<input checked="" type="checkbox"/>	Flat				
Air Mover	138		<input checked="" type="checkbox"/>	Flat				
Air Mover	1234	Air Mover	<input type="checkbox"/>	Flat	Blaze Murdock	12345	04/16/2020	04/1
Air Mover #57	AM57	Air Mover	<input checked="" type="checkbox"/>	Flat				

1 < 2 3 Page 1 of 3 > > > 20 items per page 1 - 20 of 59 items

Enter the requested information for the equipment, click the 'Save' icon once completed.

Note: A description of each field follows

Equipment Detail

Equipment List:

Name: Status:

Default Stockpoint:

Class:

Manufacturer:

Model:

Serial Number: Amps:

Equipment Type: CFM:

Bar Code:

Description:

Quantity:

Date Purchased:

Purchase Cost:

Billing Type:

Flat Rate:

Hourly Rate:

Daily Rate:

Weekly Rate:

Notes:

Sites: All Sites

Next Service

Description:

Trigger on: Date:

Reading:

Current Reading: Type:



Equipment Setup

Field Descriptions:

Equipment List **Optional*

- This allows the user to autofill specific fields such as Class, Manufacturer, Serial Number, Amps, CFM, etc. ***The Administrator creates and manages this pull down, to locate go to Settings→ System Setup→ Equipment*
- If this pull down option is not created by the Administrator or the User opts to not use this feature, all fields will be a manual entry.

Name **Required*

Status **Required*

Default Stockpoint **Optional*

- Select the Stockpoint this item will be housed when not in use

Class **Optional*

- Select the equipment class from the pulldown ***Note: Administrator may adjust this pulldown list if necessary, Settings→ System Setup→ Settings, the Equipment Settings*

Manufacturer **Optional*

- Select the equipment manufacturer from the pulldown ***Note: Administrator may adjust this pulldown list if necessary, Settings→ System Setup→ Settings, the Equipment Settings*

Model **Optional – Model Number*

Serial Number **Optional – Serial Number*

Amps **Optional – Equipment Amps*

CFM **Optional – Equipment CFM*

Bar Code **Optional*

- Enter unique bar code for scanning function in Intuitive Mobile ***Note: Additional information on how to use the scanning function for Equipment Tracking see Restoration University→ Training Documents→ Mobile→ Intuitive Mobile Equipment Tracking*

Description **Optional – Equipment Description*

Quantity **Required*

- Quantity enter in the number of these items you wish to record. ***Primarily used for the Equipment List function when performing the auto-fill.*
- Quantity (1) to be in place when entering in individual items.

Date Purchased **Optional*

- Date will always have the default date of today's date, you may adjust this date.



Equipment Setup

Billing Type **Required*

- Choose the billing type of Flat, Hourly, Daily or Weekly. Then input the monetary value in the corresponding financial rate field.
 - ****IMPORTANT:** Leave the financial rate field empty if choosing to include equipment costs in an estimate, work order, etc. If you choose to include costs here that financial rate will be calculated and populated in the Financials of the job either Estimate or Actual. ***The financial cost application "Estimate or Actual" is based on how your Administrator has set the 'Apply Equipment Charges' in the Settings→ System Setup→ Settings*
 - **EXAMPLE:**

Date	Cost Code	Description	Payee	Amount	Editable	Source
04/27/2020		Consumable - 3 Mil Plastic		\$37.50	No	
04/27/2020		Consumable - MicroBan Bio		\$192.00	No	
04/30/2020		Equipment - Ozone Generator - Checked Out and Returned		\$460.00	No	

Total Costs: **\$689.50**

Notes **Optional – This note is only included in the Equipment Detail screen and does not populate in any reports or dashboards.*

Sites **Required*

- Check mark box to include equipment item in all sites, uncheck box to allow access to other sites, highlight the sites that the item is to be included in the inventory.

Next Service **Optional*

- Description: Choose the description of the service from the pull down. ***This pull down is created and managed by the Administrator. To locate go to Settings→ System Setup→ Settings→ Equipment Settings→ Equipment Service Type*
- Trigger On: Choose the trigger (Date or Reading) for the service to be followed
- Current Reading: Enter current reading to record for 'Trigger On' function

- **EXAMPLE 1: Trigger On Date**

Next Service
 Description: Replace Filters
 Trigger on: Date: 05/01/2020
 Reading: 0.00
 Current Reading: 0.00 Type:

- **EXAMPLE 2: Trigger On Reading**

Next Service
 Description: Purge and Clean Condensate Pump
 Trigger on: Date:
 Reading: 2,500.00
 Current Reading: 2,400.00 Type: Hours