



Users' Manual for Windows® Edition



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CHAPTER 1 – INSTALLATION

Initial information you need to start EZ Maintenance™:

User Name: manager
Password: start
Key Codes: Key Coded are located on the back of the CD sleeve.

Installation of EZ Maintenance is a very simple procedure. Below are the installation instructions for a single user, stand-alone system and for a multi-user network. After installation you must activate EZ Maintenance before you begin using it.

The EZ Maintenance Key Codes will allow you to activate EZ Maintenance only once, on either your network or your stand-alone system. Once the Key Codes are used to activate your software they will not be usable for additional installations. Please read and follow the instructions provided here carefully.

Stand-Alone System Installation

1. Put in the CD-ROM containing EZ Maintenance
2. The CD should auto load the installation menu.
3. Click on the **Install** button.
4. Click on the **Install EZ Maintenance** button.
5. This will load the install program that will walk you through the rest of the setup.

After installation is complete, please activate your software by following the activation procedure described below for stand-alone systems.

Network Installation

For a multi-user network setup, EZ Maintenance has to be installed directly into the Server; it cannot be installed from a workstation.

- Server:**
1. Put the CD-ROM containing EZ Maintenance into the CD-ROM drive on the Server (or the computer you have chosen to act as server for EZ Maintenance).
 2. The CD should auto load the installation menu.
 3. Click on the **Install** button.
 4. Click on the **Install EZ Maintenance** button.
 5. This will load the install program that will walk you through the rest of the setup. If you change the default installation path, please make a note of it.
 6. After the installation is complete open **My Computer**.
 7. Open the drive that EZ Maintenance is installed on, by double clicking the drive icon.
 8. Open the **Program Files** folder (or the alternate folder you chose during installation).
 9. Right click on the EZ Maintenance folder and select **Sharing**.
 10. Make sure **Share As** is selected, click on **Apply**; then **OK**.

For a Novell network, the network administrator must install EZ Maintenance onto a network server, and map a network drive.

Novell Example: Administrator puts the following line in container or system script:
MAP ROOT Z:=SERVER:<Location of EZ Maintenance>

- Workstation:**
1. Right click on **My Computer** and select **Map Network Drive**.
 2. Click on the **Browse** button.
 3. Browse to the Server and select the shared EZ Maintenance folder (steps 8-10 above), then click **OK**
 4. Click the **Finish** button.
 5. Open **My Computer**.
 6. Open the new network drive created in steps 1-4.
 7. Find the EZ Maintenance program file, "**EZM2.EXE**"
 8. Right click on the icon and select **Copy**.
 9. Right click on the desktop and select **Paste Shortcut**.
 10. Place the EZ Maintenance installation CD into the CD-ROM drive on the workstation.
 11. The CD will auto load.
 12. Click on **Install**.
 13. Click on **Workstation Install**.

Activation

After installation, EZ Maintenance must be activated before you can begin using it. You must be connected to the Internet to do so. The Key Codes for activation are located on a label on the back of the CD sleeve. Please do not lose these numbers. You must use the Key Codes to activate the software. It is strongly suggested that you copy the Key Codes and keep them in a safe place. You will also need your Key Codes for accessing technical support and for purchasing additional licenses and upgrades.

When you run EZ Maintenance, you will be prompted for a User Name (manager) and Password (start), also located on back of the CD sleeve. The first time you log into EZ Maintenance you will be required to register your software. You must be connected to the Internet to register. Registration is quick and easy for both a stand-alone setup and a network setup.

IMPORTANT: Once the Key Codes are used to activate your software they will not be usable for activation of EZ Maintenance on another computer. Please read and follow the instructions provided here carefully.

Stand Alone System Activation Procedure:

Skip this procedure if you are installing EZ Maintenance on a network.

For a **stand-alone system**, you will use only one of the two sets of Key Codes provided on the CD sleeve. Use the **Server Key Codes**. Do not use the Workstation Key Codes.

Fill out all the required fields on the registration window. Type in Server Key Code 1 and Key Code 2 and press OK. Wait while this is transmitted over the Internet to our servers for verification. Once this is done EZ Maintenance is ready to use in a stand-alone system.

Network Activation Procedure:

For a **network setup**, registration must be done on two systems and you will use two different Key Codes: Server Key Codes and Workstation Key Codes.

Server:

You must first register on the network **server** using the **Server Key Codes**. Fill out all the required fields in the registration window. Type in Key Code 1 and Key Code 2 and press OK. Wait while this is transmitted over the Internet to our servers for verification.

Workstation:

Then register on any one of the network's **workstations**, with the second set of Key Codes (**Workstation Key Codes**). Fill out all the required fields in the registration window. Type in Key Code 1 and Key Code 2 and press OK. Wait while this is transmitted over the Internet to our servers for verification.

Adding Licenses

After completing the basic EZ Maintenance installation you may wish to license additional users on your network. Additional user licenses may be purchased at any time.

Adding licenses to EZ Maintenance is fast and simple. Make sure you are connected to the Internet: you must be connected to the Internet in order to add licenses. Open EZ Maintenance, Log on as Manager, and then click the "Add User Licenses" Main Menu button. A box will come up asking for Key Code 1 and Key Code 2. Type in the Key Codes that you were given when you purchased the additional licenses. Once you have entered the Key Codes, the information will be sent to our server for verification. Please wait until the change is completed.

Uninstall

If you choose to uninstall EZ Maintenance follow these steps.

Server / Stand-Alone:

1. Close EZ Maintenance, and make sure that all workstations have closed EZ Maintenance.
2. Click on the **Start Menu**.
3. Click on **Programs**.
4. Click on **EZ Maintenance 2**.
5. Click on **Uninstall EZ Maintenance 2**.

Workstation:

1. Right click on the EZ Maintenance icon.
2. Select **Delete**.

Backup and Restore

Backups:

Be sure to back up your database regularly, so you don't lose vital data in case of a system failure. You can use any standard backup program, including Microsoft's Backup program that comes with Windows®. Most backup programs come with recommendations on how often and in what way to do your backups. Follow those recommendations.

For an EZ Maintenance data backup, go into the main EZ Maintenance folder (C:\Program Files\EZ-Maintenance, in most cases) and back up all the files with the extensions: .dbc, .dct, .dcx, .dbf, .cdx, and .fpt. These files can be found in the main EZ Maintenance folder, located on the server in a network installation or on the computer EZ Maintenance is installed in, for a stand-alone setup. In a network installation you will not need to back up anything from the workstations.

Restores:

If your system crashes and you need to restore EZ Maintenance, do it as follows:

1. Reinstall EZ Maintenance from the CD-ROM as described in the “Installation” section, above.
2. Restore the data from your latest backup, taken as described in the “Backups” section, above. You will be overwriting the files from the new installation, so if the restore program you use asks if you want to replace the original files with the files you are restoring, answer “Yes”. (On a network installation, you will be restoring the files into the main EZ Maintenance folder on the server; there will be nothing to restore on the workstations.) When you restore your data files, have your backup program restore all your data files to the folder on the Server into which you have reinstalled EZ Maintenance. In a stand-alone installation, restore your data backup into the folder into which EZ Maintenance was installed. For example, on a network, if EZ Maintenance is installed into J:\Ezm, (with J being the network drive), this is where you restore your data. In a stand-alone setup, if the folder EZ Maintenance is installed in is in the path C:\Program Files\EZ-Maintenance, then restore all your data into that folder.

That’s all there is to it! You will now have EZ Maintenance running again with your data intact.

CHAPTER 2 – OVERVIEW / INTRODUCTION

Thank you for becoming an EZ Maintenance customer! We value your business, and are pleased to bring you a full-featured program we believe is unmatched in the market place for quality and price.

This manual contains an in depth explanation of every feature in EZ Maintenance. Names of screen objects such as windows, buttons, data input fields, and sections of the program, etc. are shown in **bold** text in this manual.

The illustrations in this manual are here for illustration purposes only. They are used as examples to demonstrate what you will see on the screen as you move through EZ Maintenance, and to give you a visual representation you can refer to when reading the text. No attempt has been made to make data in any one illustration consistent with that in other screens shown in the Manual.

Starting Up and Logging In to EZ Maintenance

Depending on how your systems administrator has set up EZ Maintenance on your computer, most users of EZ Maintenance will launch the software by double-clicking on the EZ Maintenance icon on their desktop:



Immediately after launching the software, a window will open up asking you for a username and password:

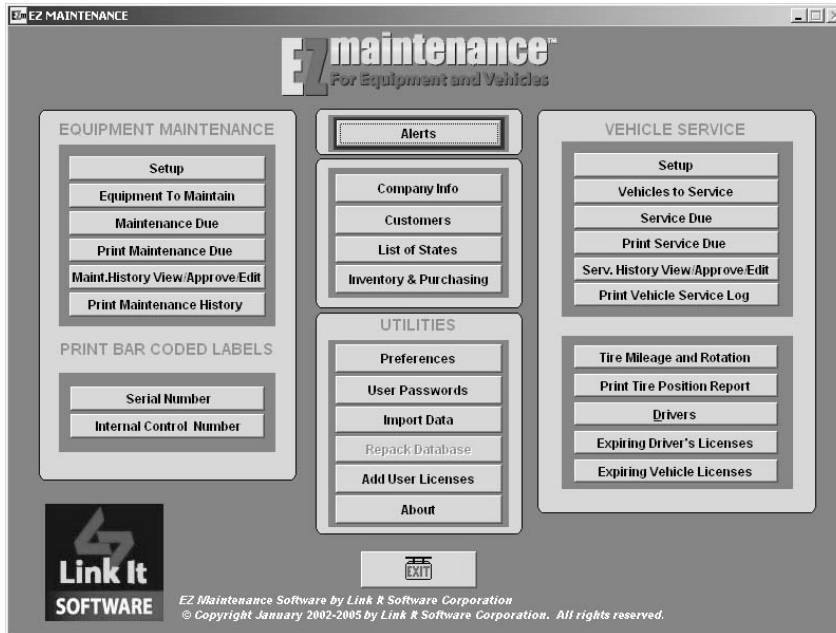
A dialog box titled 'Password Entry' with a grey background. It contains two text input fields. The first field is labeled 'User Name : ' and contains the text 'manager'. The second field is labeled 'Password : ' and contains six asterisks '*****'. At the bottom of the dialog box, there are two buttons: 'Ok' and 'Exit', both with a light grey background and a thin border.

The default username and password are “manager” and “start” respectively. Unless your administrator has changed or deleted this username and password pair, you can use these to log into the program. Click in the **User Name** box and type “manager”, and click in the **Password** box and type “start”. Then click on the **OK** button to log into EZ Maintenance, or click **Exit** if you have changed your mind and would like to exit from EZ Maintenance.

For instructions on how to add, change, or delete existing usernames and passwords, see Chapter 7 “Administrative Utilities”.

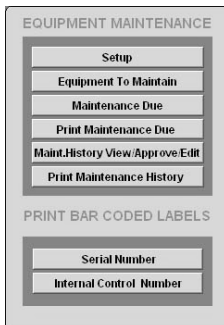
EZ Maintenance Main Menu / Manual Organization

Pictured here is the EZ Maintenance main menu, which you will be taken to immediately after logging into the software. The key features of EZ Maintenance are accessible from the main menu:



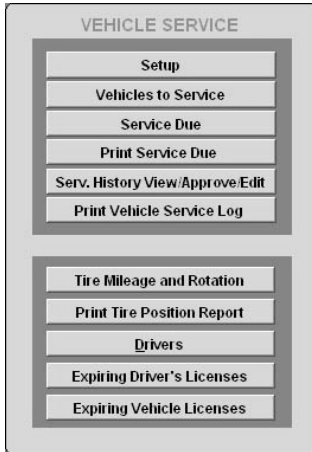
This manual is divided much in the same way that the main menu of EZ Maintenance is, and as such there are chapters dedicated to the following:

1. The **Equipment Maintenance Module**, which is represented by the eight buttons on the left side of the window. The Equipment Maintenance Module is the part of EZ Maintenance that lets you to track and control maintenance for your Equipment. Refer to chapter 4, "Equipment Maintenance Module", for the topics that deal with how to use the Equipment Maintenance module and all of the buttons pictured here:



2. The **Vehicle Service Module**, which is represented by the eleven buttons on the right side of the window. The Vehicle Service Module is the part of EZ Maintenance that lets you to track and

control maintenance for your Vehicles. Refer to chapter 5, “Vehicle Service Module”, for the topics that deal with how to use the Vehicle Service module and all of the buttons pictured here:



3. The **Inventory Module**, which is represented by the **Inventory & Purchasing** button near the center of the window. The Inventory Module lets you track inventory, create purchase orders and requests for bid, and enter your parts and materials vendors into EZ Maintenance. Refer to chapter 6, “Inventory Module”, for the topics that deal with how to use the Inventory Module.

Inventory & Purchasing

4. The administrative **Utilities**, which are represented by the five buttons just below the center of the window. Refer to chapter 7, “Administrative Utilities”, for the topics that deal with how to use these utilities and all of the buttons pictured here:



5. The other four buttons at the top of the EZ Maintenance main menu. The **Company Info**, **Customers**, and **List of States** buttons represent data entry areas that are explained in chapter 3, “General Setup and Alerts”. The **Alerts** button represents the section of the program, also explained in Chapter 3, that alerts you to overdue maintenance events as well as expiring driver and vehicle licenses.



CHAPTER 3 – GENERAL SETUP AND ALERTS

In this chapter we cover some basic setup sections available from the EZ Maintenance main menu as well as the **Alerts** section of the program.

Entering Your Company Information

If you click on the **Company Info** button on the EZ Maintenance main menu, you will be taken to a section of the program where you can enter information about your company. From the company information window, you can enter the following data items about your company into EZ Maintenance:

- Company Name
- Street Address & City, State, Zip Code
- Main Phone Number
- Main Fax Number
- Main Email Address
- Company Website URL
- Company Logo (Image File)

To enter information into this form, simply click with your mouse on one of the data fields such as **Company Name**, **City**, or **Phone No.**, and type in your entry.

The company logo is an image file; the program will accept files in .JPG, .BMP or .GIF format. If the image is large, EZ Maintenance will automatically scale it down. The image may be any size. However, to avoid a “stretching” effect in the display of the image, the ratio of the sides must be 1:1; in other words, the image must be a square. To select a logo, click on the **Select Logo** button and browse through your computer to locate the desired image. Click on the **Remove Logo** button if you’ve selected a logo but would no longer like to have one displayed.

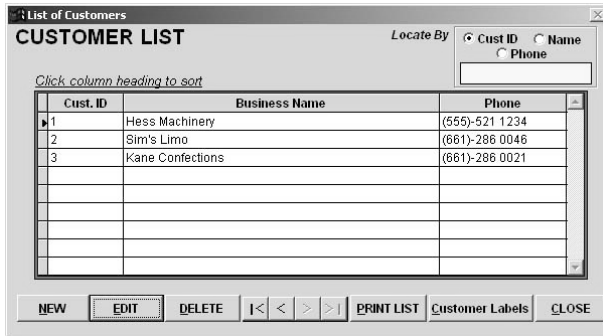
Company Name	Link It Software Inc.
Address 1	23542 Lyons Ave
Address 2	Suite 200-B
City	Santa Clarita
State	CA
Zip	91321-2562
Phone No	(818)-574 3970
Fax No	(661)-286 0020
Email Address	sales@linkitsoftware.com
Website Address	www.ez-maintenance.com
Logo	 <input type="button" value="Select Logo"/> <input type="button" value="Remove Logo"/>

Your company information will appear on the following printouts along with your company logo (if you have selected a company logo):

- Equipment and Vehicle Work Orders (for equipment work orders see chapter 4 “Equipment Maintenance Module”, and for vehicle work orders see chapter 5 “Vehicle Service Module”)
- Purchase Order (Inventory Module, see chapter 6 “Inventory Module”)
- Request for Bid (Inventory Module, see chapter 6 “Inventory Module”)

Entering Customers into EZ Maintenance

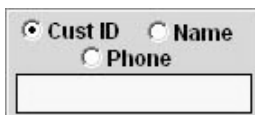
Clicking on the **Customers** button on the EZ Maintenance main menu takes you to a section of the program where you can enter any customers for whom you perform equipment or vehicle maintenance. When you click on the **Customers** button, you will be taken to the **List of Customers** window:



Notice that in the middle of the window there is a list of all the customers whom you have entered into EZ Maintenance so far, and for each customer the ID number you have chosen for them listed (**Cust. ID**), the name of the business is listed (**Business Name**), and the phone number as well (**Phone**):

	Cust. ID	Business Name	Phone
▶	1	Hess Machinery	(555)-521 1234
	2	Sim's Limo	(661)-286 0046
	3	Kane Confections	(661)-286 0021

The **List of Customers** window also contains a search feature in the upper right part of the window:



To use the search feature, first, click on one of the circles called **Cust ID**, **Name**, or **Phone** to search by customer ID, a customer name, or by phone number respectively. Then click in the yellow-colored field and type a customer ID, customer name or phone number of the customer for whom you want to search. Then hit the return key. If a customer exists in EZ Maintenance that matches your search term, it will be selected from the list.

There are also five buttons (plus a **Close** button) at the bottom of the window which represent different actions you can perform in this section of the program:

- **NEW** button: Clicking on this button allows you to enter a new customer into EZ Maintenance. This button opens up the **New Customer Information Window** where you can enter information about your new customer. This is explained in detail further down in this section.
- **EDIT** button: Clicking on this button allows you to edit the contact information for a given customer. To use this feature, select one of the displayed customers by clicking on them with your mouse, and then click on the **EDIT** button. This button opens up the **Modify Customer**

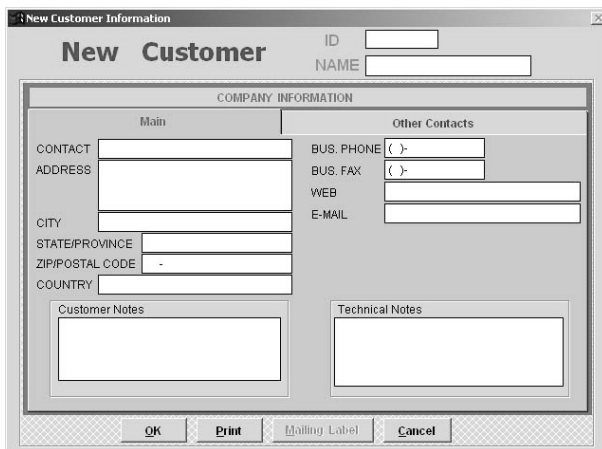
Information Window where you can edit the information about the customer you selected. This is explained in detail further down in this section.

- **DELETE** button: Clicking on this button allows you to delete a customer from EZ Maintenance. To use this feature, select one of the displayed customers by clicking on them with your mouse, and then click on the **DELETE** button.
- **PRINT LIST** button: Clicking on this button allows you to print a list of all of the customers you have currently entered in EZ Maintenance. The following data items will be printed on the customer list:
 - The customer's ID number
 - The name of the customer
 - Their main phone number
- **Customer Labels** button: Clicking on this button allows you to print labels with your customers on them.

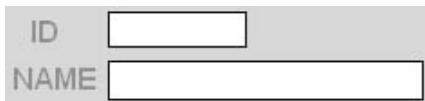
Click on the **CLOSE** button to exit from the **List of Customers** window and return to the EZ Maintenance main menu.

Entering a New Customer

Clicking on the **NEW** button in the **List of Customers** window will open up the **New Customer Information** window where you can enter contact information for your new customer:



Notice that in the upper-right portion of the window there are two data entry fields, **ID** and **Name**:



Upon creating a new customer you must enter a unique code that identifies the customer into the **ID** field in the top right portion of the window. You must also enter a name for your customer into the **NAME** field. Both the **ID** and **NAME** fields are *required* fields that must be entered for your customer before you can save the contact information you've entered. Just click to place the cursor in each field and type your entry.

In the center of the window are two tabs called **Main** and **Other Contacts**. Clicking on the **Main** tab displays a form in which you enter the main contact information for this customer:

Main		Other Contacts	
CONTACT	Bob Hess	BUS. PHONE	(555) 521-1234
ADDRESS	55689 Evergreen	BUS. FAX	(555) 123-4567
CITY	Townsville	WEB	www.hessmach.com
STATE/PROVINCE	IL	E-MAIL	bob@hessmach.com
ZIP/POSTAL CODE	56874-	DBA	
COUNTRY	Us		
Customer Notes Long time customer some equipment is housed here		Technical Notes	

To make an entry into one of the fields in the form (such as **CITY**, **COUNTRY**, or **EMAIL**), simply click in the box with your mouse and type in your entry. In addition to all of the data fields for contact information, you can also enter notes for this customer in the **Customer Notes** and **Technical Notes** fields at the bottom of the form.

Clicking on the **Other Contacts** tab displays a list of other contacts you have for this customer:

Main		Other Contacts		
TYPE	NAME	TITLE	PHONE	FAX
Billing	Adam	Technical Support	(661)-286 2154	(661)-286 3322
Technical	Jason	Tehcnical Support	(661)-207 9950	(661)-286 3322

You can add a new contact to the list by clicking on the **New Other Contact** button. After clicking on the button, you can edit any of the fields containing information about the contact by clicking on them with your mouse and typing. Use the horizontal scroll bar to scroll to the right for other data fields for the contacts.

You can also use the **Delete Other Contact** button to delete contacts. Select the contact you want to delete by clicking on it with your mouse and then clicking on the **Delete Other Contact** button.

Clicking on the **Mailing Label** button at the bottom of the bottom of the **New Customer Information** window lets you print a mailing label with the main contact information for that customer. Clicking on the **Print** button creates a printout with all of the customer contact information along with the information for the additional contacts.

When you are finished entering information into the **New Customer Information** window, simply click on the **OK** button at the bottom of the window to save your entries. If you have changed your mind and do not want to enter the new customer, then click on the **Cancel** button.

Editing an Existing Customer

As mentioned before, you can edit the information for an existing customer at the **List of Customers** window by selecting a customer by clicking on it and then clicking on the **EDIT** button. This will take you to the **Modify Customer Information** window which is similar to the **New Customer Information** window. This is where you can change information that you've entered for an existing customer:

COMPANY INFORMATION	
Main	Other Contacts
CONTACT: Bob Hess	BUS. PHONE: (555) 521-1234
ADDRESS: 55688 Evergreen	BUS. FAX: (555) 123-4567
CITY: Townsville	WEB: www.hessmach.com
STATE/PROVINCE: IL	E-MAIL: bob@hessmach.com
ZIP/POSTAL CODE: 56874	DBA:
COUNTRY: Us	
Customer Notes: Long time customer some equipment is housed here	Technical Notes:

The only difference between how the **Modify Customer Information** window works and the **New Customer Information** window works is that in the **Modify Customer Information** window you are not allowed to change the customer's **ID**.

When you have finished editing the customer, click on the **OK** button at the bottom of the window to save your changes. To exit back to the **List of Customers** window without making any changes, click on the **Cancel** button.

Entering Your List of States

In the Vehicle module of the program, there are instances where you will have to specify, for example, the state in which a vehicle is registered or a driver is licensed to operate a vehicle. In order to ensure that this data is entered in a uniform manner, the states that are entered must be chosen from the list of states that you specify in the **List of States** section of the program, which can be accessed by clicking on the **List of States** button on the EZ Maintenance main menu.

These are the functions that are available from the **List of States** window:

- **New** button: this button allows you to add a new state to the list. To add a new state, first click on the **New** button. A window will pop up prompting you to type in a name for the new state. Type

in the name for the state and then click on the **OK** button to accept your entry (or click the **Cancel** button to abort). Once you have clicked on **OK**, your state will be added to the list.

- **Edit** button: this button allows you to edit the name for a currently existing state. To edit a state, first select a state from the list that you would like to edit by clicking on it with your mouse. Then click on the **Edit** button. A window will pop up prompting you to type in a new name for the state. Once you have finished making your changes, click on the **OK** button to accept your changes (or click the **Cancel** button to abort).
- **Delete** button: this button allows you to delete a currently entered state. To delete a state, first select a state from the list that you would like to delete by clicking on it with your mouse. Then click on the **Delete** button. A window will pop up prompting you to confirm that you indeed want to delete the state. Click on the **OK** button to proceed and delete the state, or click on the **Cancel** button if you have changed your mind and you do not want to delete the state.



When you have finished making your changes to the **List of States** and wish to return to the EZ Maintenance main menu, then click on the **Close** button.

Understanding the Alerts Feature

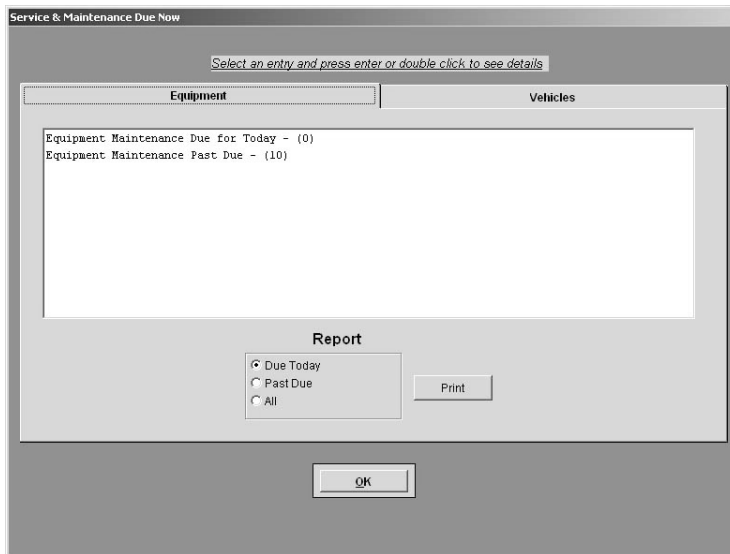
EZ Maintenance has a feature that alerts you to overdue equipment maintenance, overdue vehicle maintenance, vehicles that are falling below their minimum fuel efficiency, expiring vehicle licenses, and expiring drivers licenses.

One way in which EZ Maintenance alerts you to the aforementioned items is through displaying red dots on certain buttons on the EZ Maintenance main menu. For example, when a piece of equipment is either due today for maintenance or overdue for maintenance, a red dot will appear on the **Maintenance Due** button:



Similarly, when a vehicle is due today for maintenance or overdue for maintenance, a red dot will appear on the **Vehicle Service** button; when a drivers license is within two months of expiring, a red dot will appear on the **Expiring Drivers' Licenses** button; and when a vehicle license is within two months of expiring, a red dot will appear on the **Expiring Vehicle Licenses** button.

EZ Maintenance also contains a section where all these alerts and more are conveniently listed together in the **Service & Maintenance Due Now** window:



This window can be accessed two ways:

1. It automatically pops up upon launching the program if EZ Maintenance needs to alert you to anything.
2. You can access this window by clicking on the **Alerts** button on the EZ Maintenance main menu.

Notice that there are two tabs on this window, **Equipment** and **Vehicles**. Clicking on the **Equipment** tab displays two items: alerts for equipment maintenance that is due today (**Equipment Maintenance Due for Today**), and alerts for equipment that is past due (**Equipment Maintenance Past Due**):

```
Equipment Maintenance Due for Today - (2)
Equipment Maintenance Past Due - (8)
```

The number in parentheses following each item indicates the number of maintenance events that are due or overdue.

To see all equipment maintenance events that are due today, double-click on **Equipment Maintenance Due for Today**. This will display a list below that shows all of the equipment maintenance events that are scheduled for today along with the internal control number of the piece of equipment for which the maintenance is scheduled (**INTERNAL CONT NO**) and the type of maintenance that is scheduled (**TYPE**):

```
Equipment Maintenance Due for Today - (2)
-----INTERNAL CONT NO      | TYPE-----
-----|-----
605    | Daily
505    | Daily
```

Similarly, to see all equipment maintenance events that are overdue, double-click on **Equipment Maintenance Past Due**. This will display a list below that shows all of the equipment maintenance events that are overdue along with the internal control number of the piece of equipment for which the maintenance is scheduled (**INTERNAL CONT NO**), the type of maintenance that is scheduled (**TYPE**), the actual due date of the maintenance (**DATE DUE**), and the amount of usage hours that need to be logged for the maintenance to become due (**HOURS LEFT**):

Equipment Maintenance Past Due - (8)			
INTERNAL CONT NO	TYPE	DATE DUE	HOURS LEFT
600	Daily	12/18/04	50
502	Daily	12/18/04	0
102	30 Day	01/13/05	0
304	30 Day	01/13/05	0
101	30 Day	01/13/05	0
605	30 Day	01/13/05	-25
600	30 Day	01/16/05	-100
304	Annual	12/14/05	0

If you click on the **Vehicles** tab, you will see five items:

Vehicle Service Due for Today - (2)
Vehicle Service Past Due - (8)
Usage Flag: Advance Notice of Vehicle Service Due by Usage - (5)
High Fuel Consumption Vehicles - (3)
Expiring Vehicle Licenses - (5)

The number in parentheses following each category shows the number of items contained in each.

Double-clicking on **Vehicle Service Due for Today** will display a list below that shows all of the vehicle maintenance events that are scheduled for today along with the vehicle number of the vehicle for which the maintenance is scheduled (**VEHICLE NO**) and the type of maintenance (**TYPE**):

Vehicle Service Due for Today - (2)	
VEHICLE NO	TYPE
201	Routine Maintenance
202	Routine Maintenance

To see all equipment maintenance events that are overdue, double-click on **Vehicle Maintenance Past Due**. This will display a list below that shows all of the vehicle maintenance events that are overdue along with the vehicle number of the vehicle for which the maintenance is scheduled (**VEHICLE NUMBER**), the type of maintenance that is scheduled (**TYPE**), the actual due date of the maintenance (**DATE DUE**), and the amount of usage units that need to be logged for the maintenance to become due (**MILES LEFT**):

Vehicle Service Past Due - (8)			
VEHICLE NUMBER	TYPE	DATE DUE	MILES LEFT
200	Routine Maintenance	01/13/05	0
202	Cooling System Maint	02/12/05	10000
202	Transmission Mainten	02/12/05	12000
201	Brake Maintenance	03/14/05	14950
100	Routine Maintenance	03/20/05	3000
300	Cooling System Maint	06/18/05	6000
300	Transmission Mainten	12/09/05	4000
100	Brake Maintenance	06/07/06	-3000

Double-clicking on **Usage Flag: Advance Notice of Vehicle Service Due by Usage** will display a list of all maintenance events that are due by usage along with the vehicle number of the vehicle for which the maintenance is scheduled (**VEHICLE NUMBER**), the type of maintenance that is scheduled (**TYPE**), the actual due date of the maintenance (**DATE DUE**), and the amount of usage units that need to be logged for the maintenance to become due (**MILES LEFT**):

Usage Flag: Advance Notice of Vehicle Service Due by Usage - (5)			
VEHICLE NUMBER	TYPE	DATE DUE	MILES LEFT
100	Brake Maintenance	06/07/06	-3000

Double-clicking on **High Fuel Consumption Vehicles** shows all of the vehicles that have fallen below the minimum fuel efficiency mark that you have specified for each.

Double-clicking on **Expiring Vehicle Licenses** shows all of the vehicle licenses that are expiring within 3 months, along with the vehicle number to which the license belongs (**VEHICLE NUMBER**), the license number (**LICENSE**), and the expiration date of the license (**EXPIRATION**):

Expiring Vehicle Licenses - (2)		
VEHICLE NUMBER	LICENSE	EXPIRATION
200	90yut34	06/20/07
202	2tup798	04/26/07

Lastly, at the bottom of both the **Equipment** and **Vehicle** tabs, there is a print feature which you can use to print either all of the maintenance events to which you are being alerted, just the maintenance events that are due today, or just the maintenance events that are past due:

To do this, click on one the circles called **Due Today**, **Past Due**, or **All** respectively and then click on the **Print** button.

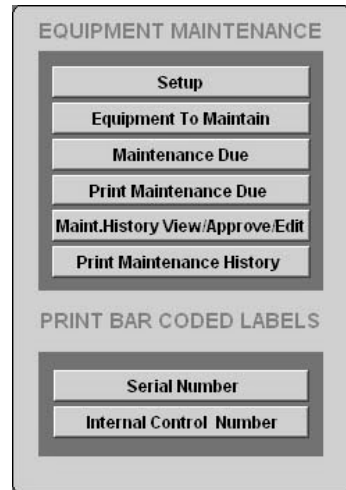
To exit the **Service & Maintenance Due Now** window and return to the EZ Maintenance main menu, click on the **OK** button at the bottom of the window.

CHAPTER 4 – EQUIPMENT MAINTENANCE MODULE

The Equipment Maintenance Module is the section of EZ Maintenance that you use to track and control maintenance for your equipment. The Equipment Module is represented by the eight buttons on the left side of the EZ Maintenance main menu:

These eight buttons represent actions you can perform within the Equipment module:

- Clicking on the **Setup** button takes you to a section of the program where you setup the Equipment Module. This must be done before you begin to track and control maintenance for your equipment. See further down in this chapter for the topic “Equipment Module Setup” for in-depth information.
- **Equipment to Maintain**: Clicking on the **Equipment to Maintain** button takes you to a section of the program where you enter your equipment into EZ Maintenance. See further down in this chapter for the topic “Entering Equipment & Usage Logs” for in-depth information.
- **Maintenance Due**: Clicking on the **Maintenance Due** button takes you to a section of the program where you can see upcoming maintenance events and open work orders and create work orders (both routine work orders and unscheduled work orders for unexpected break-downs). See further down in this chapter for the topic “Maintenance Due” for in-depth information. Also see the topic “Equipment Work Orders” for in-depth information on how to create work orders for equipment maintenance.
- **Print Maintenance Due**: Clicking on the **Print Maintenance Due** button takes you to a section of the program where you can print a report showing all maintenance events that are due during a date range. See further down in this chapter for the topic “Print Maintenance Due” for in-depth information.
- **Maint.History View/Approve/Edit**: Clicking on the **Maint.History View/Approve/Edit** button takes you to a section of the program where you can view the entire history of work orders for equipment. See further down in this chapter for the topic “Maintenance History / Work Order Approval” for in-depth information.
- **Print Maintenance History**: Clicking on the **Print Maintenance History** button takes you to a section of the program where you can print a complete work order history for a specific piece of equipment. See further down in this chapter for the topic “Print Maintenance History” for in-depth information.
- **Serial Number** and **Internal Control Number**: These buttons allow you to print bar coded labels or stickers for your equipment which contain manufacturer serial numbers or internal control numbers, respectively. See further down in this chapter for the topic “Print Bar Coded Labels” for in-depth information

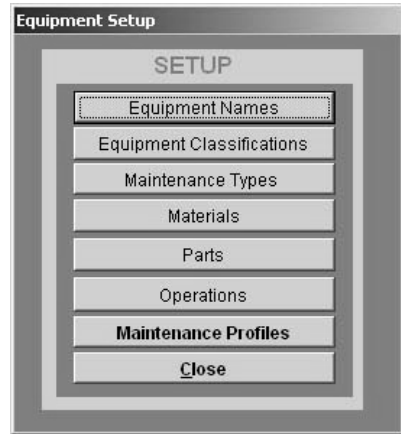


Equipment Module Setup

The setup section of the Equipment Module of EZ Maintenance is where you enter data which you will use later to specify the maintenance requirements for the equipment that you enter into the program. To access this section of the program, click on the **Setup** button under **Equipment Maintenance** on the main menu of EZ Maintenance. This will open a window containing a menu of seven buttons plus a **Close** button that you can click on to return to the EZ Maintenance main menu.

Each of these seven buttons represents an action you can perform in this section of the program:

- **Equipment Names:** Clicking on the **Equipment Names** button takes you to a section of the program where you enter general names for equipment which you will choose from when entering new equipment into the program. See further down in this section for the sub topic “Entering Equipment Names” for in-depth information.
- **Equipment Classifications:** Clicking on the **Equipment Classifications** button takes you to a section of the program where you enter names for classifications that you can assign to your pieces of equipment to aid you in tracking them. See further down in this section for the sub topic “Entering Equipment Classifications” for in-depth information.
- **Maintenance Types:** Clicking on the **Maintenance Types** button takes you to a section of the program where you enter names that you give to scheduled recurring maintenance events. See further down in this section for the sub topic “Entering Maintenance Types” for in-depth information.
- **Materials:** Clicking on the **Materials** button takes you to a section of the program where you enter into your inventory the materials which you use to perform maintenance on your equipment. See further down in this section for the sub topic “Entering Materials for Equipment Maintenance” for in-depth information.
- **Parts:** Clicking on the **Parts** button takes you to a section of the program where you enter into your inventory replacement parts for your equipment. See further down in this section for the sub topic “Entering Replacement Parts for Equipment Maintenance” for in-depth information.
- **Operations:** Clicking on the **Operations** button takes you to a section of the program where you enter the operations you will perform when doing equipment maintenance. See further down in this section for the sub topic “Entering Operations” for in-depth information.
- **Maintenance Profiles:** Clicking on the **Maintenance Profiles** button takes you to a section of the program where you can enter descriptions of maintenance for pieces of equipment with similar maintenance requirements. See further down in this section for the sub topic “Entering Maintenance Profiles” for in-depth information.

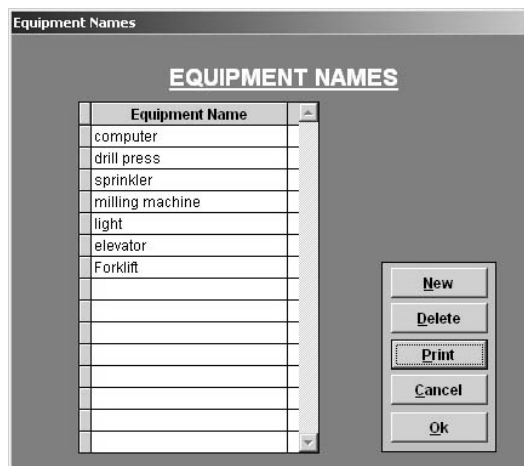


Entering Equipment Names

Clicking on the **Equipment Names** button brings you to a section of **Setup** for the Equipment Module where you enter the names that you will apply to each piece of equipment you enter into EZ Maintenance in order to identify what kind of equipment they are. The equipment names are entered into the **Equipment Names** window:

To enter a new equipment name, click on the **New** button. This will create a blank entry at the end of the list of equipment names; type the new equipment name and then hit the return key.

If you'd like to edit an existing equipment name, select the one you'd like to edit by clicking on it with your mouse and type to make the desired change.



If you'd like to delete an existing equipment name, select the one you'd like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered equipment names by clicking on the **Print** button.

When you are finished working with equipment names, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Equipment Classifications

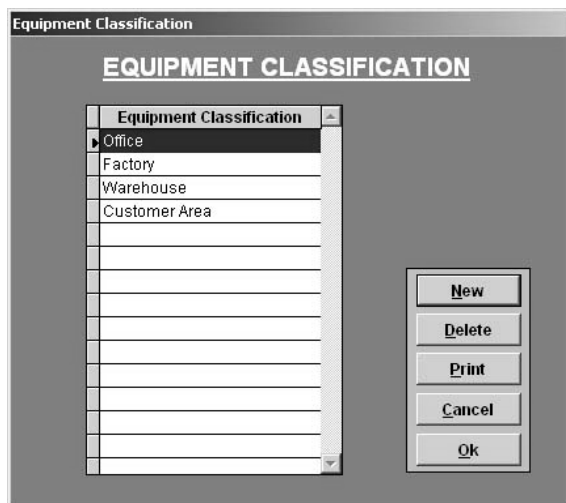
Clicking on the **Equipment Classifications** button brings you to a section of **Setup** for the Equipment Module where you enter classification names which you apply to pieces of equipment you enter into the program to in order to aid you in tracking them. The classifications are entered into the **Equipment Classifications** window:

To enter a new equipment classification, click on the **New** button. This will create a blank entry at the end of the list of classifications; type the new equipment classification and then hit the return key.

If you'd like to edit an existing equipment classification, select the one you'd like to edit by clicking on it with your mouse and type to make the desired change.

If you'd like to delete an existing equipment classification, select the one you'd like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered equipment classifications by clicking on the **Print** button.



When you are finished working with equipment classifications, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Maintenance Types

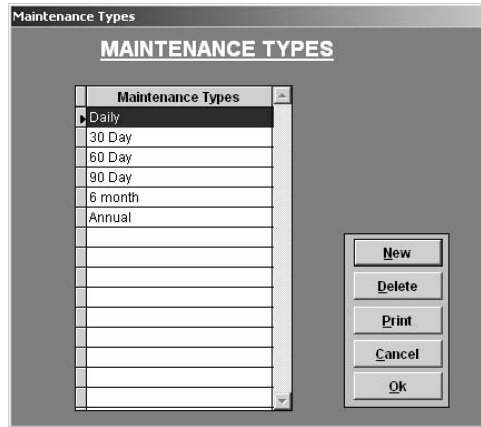
Clicking on the **Maintenance Types** button brings you to a section of **Setup** for the Equipment Module where you enter names for regularly performed or emergency maintenance events. The maintenance types are entered into the **Maintenance Types** window:

To enter a new maintenance type, click on the **New** button. This will create a blank entry at the end of the list of maintenance types; type the new maintenance type and then hit the return key.

If you'd like to edit an existing maintenance type, select the one you'd like to edit by clicking on it with your mouse and type to make the desired change.

If you'd like to delete an existing maintenance type, select the one you'd like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

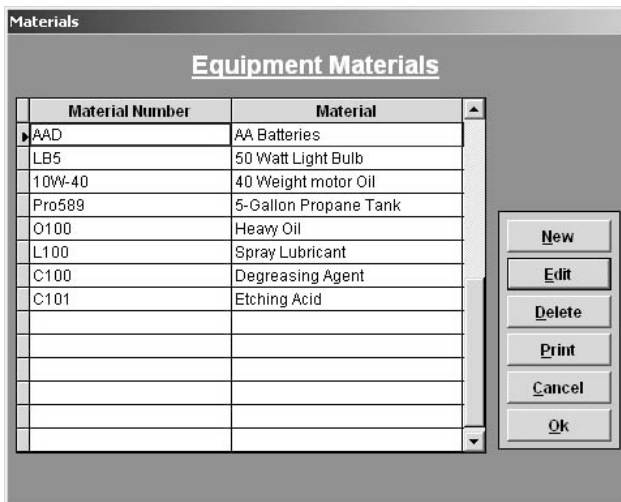
You can also print out a list of all of the currently entered maintenance types by clicking on the **Print** button.



When you are finished working with maintenance types, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Materials for Equipment Maintenance

Clicking on the **Materials** button brings you to a section of the **Setup** section for the Equipment Maintenance module where you enter the materials you expect to use in your equipment maintenance. The materials you enter here are included in your inventory. The difference between entering your materials directly into the **Inventory** section of EZ Maintenance (see chapter 6 “Inventory Module”) and entering them here is that, when you enter them here, they are automatically designated as being materials that are used only for equipment maintenance.



Entering a New Material

To enter a new material, click on the **New** button. This will open up the **New Inventory** window where you will enter the details of the new material you are entering:

Notice that the drop-down selection boxes for **Inventory Type** and **Equip. or Vehicle** have already been selected with “Material” and “Equipment” respectively; as you might expect, if you change these, the item will not appear in the **Materials** section of the **Equipment Module Setup**.

To enter data into each of these fields (except for **Preferred Vendor**, **Inventory Type**, **Equip. or Vehicle**), just click inside the box and type your entry. The **Preferred Vendor**, **Inventory Type**, and **Vehicle** fields are drop-down boxes; to enter data into these, click on the arrow on the right side of each to expand the list and click to select your desired entry. The table below summarizes the meaning of each of these data items:

Item Number: This is a unique code that identifies the item. Although you can enter any characters into this field, it is recommended that you choose a brief code that consists of only letters and digits.

Name/Description: Enter a name or a short description of the item here.

Date: Enter the date on which tracking for this item began.

Preferred Vendor: From the drop-down box, select the vendor from whom you prefer to order this item. For a vendor to be a selection here, you must have entered them into the Vendors section of EZ Maintenance.

Manufacturer: Enter the manufacturer of the item you are entering.

Unit: Enter the name of the unit which you are using to measure the quantity of this item (e.g. “gallons”, “bundles”).

Cost: Enter the cost per unit for this item.

% Markup: If you sell items directly out of your inventory, then this is the extra percentage you charge the customer.

Price: This is the price of the item plus the markup percentage, the full price you will charge a customer if you sell them the item directly from your inventory.

Long Description: A longer and more detailed explanation of the item.

ID Code 1: If you have another ID code by which you track an inventory item, enter it here.

ID Code 2: If you have another ID code by which you track an inventory item, enter it here.

Inventory Type: From the drop-down box, select whether the item is a material, a part, or neither.

Equip. or Vehicle: Select whether the inventory item is used in only equipment maintenance, only vehicle maintenance, or whether it is used in both.

Quantity on Hand: Enter the quantity of the item you currently have in your actual inventory.

Minimum Level: Enter the lowest quantity of this item you want to allow. If the amount on hand of the inventory item goes below this level, it will be flagged as low on the inventory listing window.

Maximum Level: Enter the highest quantity of this item you want to allow. If you create a purchase order in which you order an amount of this item that would cause it to go above the maximum level, you will be warned that you are ordering too many.

Reorder Quantity: Enter the quantity in which you want new orders of this item to be made. When you are creating a purchase order containing this inventory item, the reorder quantity for it will be shown to guide the user placing the order.

Warehouse Location: Enter the actual physical location where this item is stored.

Please note that if you have not yet entered any vendors into EZ Maintenance, no selections will appear in the **Preferred Vendor** drop-down menu. See chapter 6 “Inventory Module” for information on how to enter your materials and parts vendors into EZ Maintenance.

If you want to print a report showing all of the details of the material you’ve entered, click on the **Print** button.

When you are finished entering the information for the new material, click on the **OK** button to save the new material. If you have changed your mind and you do not want to enter the new material, then click on the **Cancel** button.

Editing an Existing Material

To edit an existing material, at the **Materials** window, select the material you want to edit by clicking on it with your mouse and then clicking on the **Edit** button. This will open up the **Modify Inventory Information** window.

Modify Inventory Information			
Item Number:	C101	ID Code 1:	000563 11
Name/Description:	Etching Acid	ID Code 2:	A002
Date:	12/15/2004 <input type="checkbox"/> Active	Inventory Type:	Material
Preferred Vendor:	Napa	Equip. or Vehicle:	Equipment
Manufacturer:	Chem Labs West		
Unit:	Ounces	Quantity on Hand:	35.0
Cost:	\$25.000000	Minimum Level:	50.0
% Markup:	0.000000	Maximum Level:	80.0
Price:	\$25.000000	Reorder Quantity:	25.0
Long Description:	concentrated Muriatic acid for metal etching. 3.5 Molar Aquatic solution. PH: 0	Warehouse Location:	LA

Print OK Cancel

When you are finished changing the information for the material, click on the **OK** button to save your changes. If you want to exit and discard all of the changes you’ve made, then click on the **Cancel** button.

Deleting a Material

To delete an existing material, at the **Materials** window, select the material you want to delete by clicking on it with your mouse and then clicking on the **Delete** button. This will pop up a small window asking you to confirm that you indeed want to delete the material: click on **Yes** to proceed with deleting the material or click on **No** if you have changed your mind and do not want to delete the material.

Printing a List of Materials

You can also print out a list of the materials that you use for equipment maintenance by clicking on the **Print** button.

When you are finished entering materials, click on the **OK** button. Clicking on the **Cancel** button exits without saving any changes.

Notice that the drop-down selection boxes for **Inventory Type** and **Equip. or Vehicle** have already been selected with “Part” and “Equipment” respectively; as you might expect, if you change these, the item will not appear in the **Parts** section of the **Equipment Module Setup**.

To enter data into each of these fields (except for **Preferred Vendor, Inventory Type, Equip. or Vehicle**), just click inside the box and type your entry. The **Preferred Vendor, Inventory Type,** and **Vehicle** fields are drop-down boxes; to enter data into these, click on the arrow on the right side of each to expand the list and then select your desired entry. The table below summarizes the meaning of each of these data items:

Item Number: This is a unique code that identifies the item. Although you can enter any characters into this field, it is recommended that you choose a brief code that consists of only letters and digits.

Name/Description: Enter a name or a short description of the item here.

Date: Enter the date on which tracking for this item began.

Preferred Vendor: From the drop-down box, select the vendor from whom you prefer to order this item. For a vendor to be a selection here, you must have entered them into the Vendors section of EZ Maintenance.

Manufacturer: Enter the manufacturer of the item you are entering.

Unit: Enter the name of the unit which you are using to measure the quantity of this item (e.g. “gallons”, “bundles”).

Cost: Enter the cost per unit for this item.

% Markup: If you sell items directly out of your inventory, then this is the extra percentage you charge the customer.

Price: This is the price of the item plus the markup percentage, the full price you will charge a customer if you sell them the item directly from your inventory.

Long Description: A longer and more detailed explanation of the item.

ID Code 1: If you have another ID code by which you track an inventory item, enter it here.

ID Code 2: If you have another ID code by which you track an inventory item, enter it here.

Inventory Type: From the drop-down box, select whether the item is a Part, a part, or neither.

Equip. or Vehicle: Select whether the inventory item is used in only equipment maintenance, only vehicle maintenance, or whether it is used in both.

Quantity on Hand: Enter the quantity of the item you currently have in your actual inventory.

Minimum Level: Enter the lowest quantity of this item you want to allow. If the amount on hand of the inventory item goes below this level, it will be flagged as low on the inventory listing window.

Maximum Level: Enter the highest quantity of this item you want to allow. If you create a purchase order in which you order an amount of this item that would cause it to go above the maximum level, you will be warned that you are ordering too many.

Reorder Quantity: Enter the quantity in which you want new orders of this item to be made. When you are creating a purchase order containing this inventory item, the reorder quantity for it will be shown to guide the user placing the order.

Warehouse Location: Enter the actual physical location where this item is stored.

Please note that if you have not yet entered any vendors into EZ Maintenance, no selections will appear in the **Preferred Vendor** drop-down menu. See chapter 6 “Inventory Module” for information on how to enter your materials and parts vendors into EZ Maintenance.

If you want to print a report showing all of the details of the part you’ve entered, click on the **Print** button.

When you are finished entering the information for the new part, click on the **OK** button to save the new part. If you have changed your mind and you do not want to enter the new part, then click on the **Cancel** button.

Editing an Existing Part

To edit an existing part, at the **Parts** window, select the part you want to edit by clicking on it with your mouse and then clicking on the **Edit** button. This will open up the **Modify Inventory Information** window.

When you are finished changing the information for the part, click on the **OK** button to save your changes. If you want to exit and discard all of the changes you've made, then click on the **Cancel** button.

Deleting a Part

To delete an existing part, at the **Parts** window, select the part you want to delete by clicking on it with your mouse and then clicking on the **Delete** button. This will pop up a small window asking you to confirm that you indeed want to delete the part: click on **Yes** to proceed with deleting the part or click on **No** if you have changed your mind and do not want to delete the part.

Printing a List of Parts

You can also print out a list of the Parts that you use for equipment maintenance by clicking on the **Print** button.

When you are finished entering Parts, click on the **OK** button. Clicking on the **Cancel** button exits without saving any changes.

Entering Operations

The **Operations** section of **Setup** for the Equipment Module is where you enter names and descriptions for operations you perform during maintenance events. The operations are entered into the **Equipment Operations** window:

To enter a new operation, click on the **New** button. This will create a blank entry at the end of the operations list; type the new operation name and then hit the return key.

After you've created a new operation, you must also create a description for the

Operation Name	Operation Description
Inspect Support Cables	Memo
Replace Rollers	Memo
Test Sprinkler head	Memo
Perform Load Test	Memo
Replace Internal Lightin	Memo
Update Computers	Memo
Replace Fork Lift Blades	Memo
Check Propane Tank	Memo
Check Light	Memo

operation. To do this, double click on the word “memo” to the right of the operation; this will pop up a window into which you will type the operation description. Type in the description and then click on the **Close** button when you are finished. Notice that the word “memo” to the right of your new operation is now spelled with a capital ‘M’. The capital ‘M’ indicates that the operation has a corresponding description. It is important to create a description for every operation because the operation description is printed on work orders.

You can also edit existing operations. To edit an operation name, simply click on the name you’d like to change and then type to make your changes. To edit a description for an operation, double click on the word “memo” (or “Memo”), type to make your changes, and then click the **Close** button when finished.

If you’d like to delete an existing operation, select the one you’d like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered operations by clicking on the **Print** button.

When you are finished working with operations, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Maintenance Profiles

The **Maintenance Profiles** section of EZ Maintenance is where you enter descriptions of what maintenance is performed on equipment and how frequently it is performed. Maintenance profiles are not meant for a one specific piece of equipment, but rather they are applied to a group of equipment all sharing the same maintenance requirements.

There are four main operations that you can perform from the **Maintenance Profile** window:

- **Create a New Maintenance Profile:** Click on the **New** button to start creating a new maintenance profile. See further down in this section for the sub topic “Creating a New Maintenance Profile” for further explanation on creating a new maintenance profile.
- **Edit a Maintenance Profile:** Select a maintenance profile by clicking on it, and then click on the **Edit** button to make changes to the maintenance profile you selected. See further down in this section for the subtopic “Editing a Maintenance Profile” further information on editing a maintenance profile.
- **Delete a Maintenance Profile:** To delete a maintenance profile, select a maintenance profile by clicking in it and then clicking on the **Delete** button.
- **Print a List of All Maintenance Profiles:** You can print a list of all of the maintenance profiles currently entered into EZ Maintenance by clicking on the “Print” button.



When you are finished working with maintenance profiles, you may click the **Close** button within the **Maintenance Profile** window to return to the **Setup** menu.

Creating a New Maintenance Profile

As described above, to begin creating a new maintenance profile, click on the **New** button within the **Maintenance Profile** window. This will open the **New Maintenance Profile** window:

Type	No. of Days	Comments

First, enter a name for the new maintenance profile in the **Profile Name** box by clicking on it and then typing in the name. You can also enter a description into the **Description** box if you wish.

In the middle of the **New Maintenance Profile** window you will see a table which lists all of the maintenance events contained in this maintenance profile and how frequently they are performed.

Type	No. of Days	Comments
30 Day	30	
Daily	1	
Annual	365	

To add a new maintenance event to the list, click on the **New Detail** button. This will open the **Equipment Maintenance Profile Details** window where you will enter the details about this maintenance event such as: the frequency at which it is performed, the materials and parts used, and the specific operations performed.

To add a new material to the list, click on the **New** button. A new blank entry will be created in the materials list. To specify what material you want to add to the materials list, select its material number (how it is referred to in inventory) from the drop-down box in the **Material Number** column. The name of the material will automatically display in the **Material** column. After you've selected which material you want to add, then you must enter the quantity that is to be used in the maintenance: click on the cell in the column named **Quantity** and type in the desired quantity. To delete a material from the list, select it by clicking on it and then click on the **Delete** button.

If you click on the **Operations** tab, this will display the list of operations to be performed during this maintenance:

Materials		Operations		Parts to Maintain	
Sequence No.	Operation Name	Operation Description			
1	Replace Rollers	Memo			
2	Perform Load Test	Memo			
3	Inspect Support Cables	Memo			

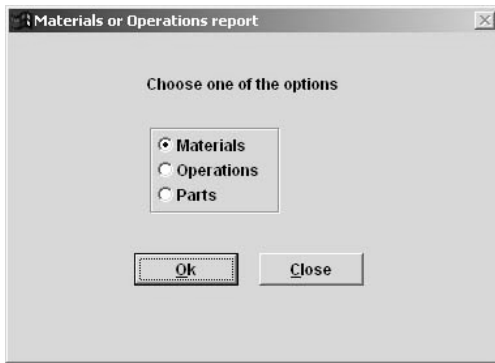
To add a new operation to the list, click on the **New** button. A new blank entry will be created in the operations list. Select the operation you wish to add to the list from the drop-down menu in the **Operation Name** column. Next specify what step # this operation is by clicking on the cell in the **Sequence No.** column and typing in the step #. You can delete an operation from the list by clicking on it to select it and then clicking on the **Delete** button.

Lastly, if you click on the **Parts to Maintain** tab, this will display the list of parts to check and/or replace during this maintenance:

Materials		Operations		Parts to Maintain	
Part Number	Part				
2G Cab	Elevator Support Cable				
54	Hydraulic Door				

To add a new part to the list, click on the **New** button. Then select the number of the part (how it is referred to in inventory) from the drop-down menu in the **Part Number** column. The name of the part will automatically display to the right in the **Part** column. To delete a part from the list, select it by clicking on it and then clicking on the **Delete** button.

The **Print** button at the bottom of the window lets you print a report containing either the materials, parts, or operations contained in the maintenance. Clicking the **Print** button pops up a small window:



Then click on one of the small circles called **Materials**, **Operations** or **Parts** to select what you want to print. Then click on the **OK** button to print your selection, or click on the **Cancel** button if you've changed your mind and do not want to print.

Once you are finished entering all the information about the scheduled maintenance event, you can click on the **OK** button to save your entries and return to the **New Maintenance Profile** window. Click **Cancel** if you have changed your mind and do not want to save your changes.

Once you have returned to the **New Maintenance Profile** window, you will notice that the maintenance event that you entered is added to the maintenance profile and is listed in the table. You can add more events by clicking on the **New Detail** button. You can edit existing events by selecting one by clicking on it and then clicking on the **Edit Detail** button. You can delete maintenance events from the profile by selecting one by clicking on it and then clicking on the **Delete Line** button.

When you are finished adding events to the maintenance profile, click on the **OK** button to save the profile. If you have changed your mind and do not want to add the profile, then click on the **Cancel** button.

Editing a Maintenance Profile

To edit a maintenance profile, select the maintenance profile you want to edit at the **Maintenance Profile** window (which is where the maintenance profiles are listed) by clicking on it and then click on the **Edit** button. This will open up the **Edit Maintenance Profile** window:

Equipment Listing

Equipment ClassFilter :

 Leave Blank To View all Classes

Type to Locate:
 Equipment Name
 Internal Control No.
 Mfr. Serial No

Scan a Barcode to Locate :
 Internal Control No.
 Mfr. Serial No

Click column heading to sort

Equipment Name	Profile	Internal Control Number	Manufacturer Serial Number	Equipment Classification
elevator	Elevator	304	kj76753	Customer Area
Forklift	Fork Lift	600	b587-g	Warehouse
computer	Computer	101		Office
computer	Computer	102		Office
Forklift	Fork Lift	605	hj567-f	Factory
light	Ceiling Spotlight	502		Factory
light	Ceiling Spotlight	505	ge450	Warehouse

Here you can see all of the pieces of equipment for which you currently using EZ Maintenance to track and control maintenance. There is a list in the center of the window that shows each piece of equipment:

Equipment Name	Profile	Internal Control Number	Manufacturer Serial Number	Equipment Classification
elevator	Elevator	304	kj76753	Customer Area
Forklift	Fork Lift	600	b587-g	Warehouse
computer	Computer	101		Office
computer	Computer	102		Office
Forklift	Fork Lift	605	hj567-f	Factory

For each piece of equipment you can see what kind of equipment it is (**Equipment Name**), what kind of maintenance is performed for it (**Profile**), the internal control number which you use to track it (**Internal Control Number**), its manufacturer serial number (**Manufacturer Serial Number**), and its classification (**Equipment Classification**). You can also sort the list by any of the aforementioned data items by clicking on the column headers **Equipment Name**, **Profile**, **Internal Control Number**, **Manufacturer Serial Number**, or **Equipment Classification**.

At the top of the **Equipment Listing** window are some search functions. The first is the classification filter:

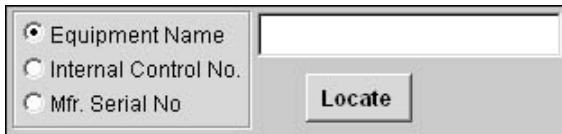
Equipment ClassFilter :

 Leave Blank To View all Classes

By default, the equipment list in the center of the window displays all equipment regardless of its classification. However, you can use the classification filter to view all of the equipment belonging to a single classification at one time. To do this, click on the arrow of the right side of the **Equipment ClassFilter** box to expand the drop-down menu, and then select a classification from the list by clicking on

it. The equipment list in the center of the window will then display all of the pieces of equipment and only those pieces of equipment belonging to that classification.


You can also search for a piece of equipment by looking it up by its equipment name (i.e. what kind of equipment it is), its internal control number, or by its manufacturer serial number. This can be done in the box in the upper right hand corner of the screen:



The screenshot shows a search interface with three radio buttons on the left: 'Equipment Name' (selected), 'Internal Control No.', and 'Mfr. Serial No.'. To the right of these buttons is a text input box. Below the input box is a button labeled 'Locate'.

Just click in the box and type either the equipment name, the internal control number, or the manufacturer serial number, and then click one of the circles named **Equipment Name**, **Internal Control No.**, or **Mfr. Serial Number**. Then click on the Locate button immediately below the box in which you typed. If what you typed matches with an internal control number or a manufacturer serial number of an existing piece of equipment, the piece of equipment you are looking for will be selected in the list. If you have typed in an equipment name for which there are multiple matches, the first in the list of matches (according to how you have the list sorted) will be selected.

If you have printed labels or stickers with barcodes for equipment, you can also locate the piece of equipment here by just “swiping” the barcode. This is done in the other box in the upper right hand corner of the screen called **Scan a Barcode to Locate**:



The screenshot shows a search interface with two radio buttons on the left: 'Internal Control No.' and 'Mfr. Serial No.'. To the right of these buttons is a text input box. Below the input box is a button labeled 'Locate'.

First, select whether the barcode you are swiping contains an internal control number or a manufacturer serial number by clicking on one of the circles named **Internal Control No.** or **Manufacturer Serial Number**. Then click on the box to the right to place the cursor inside the box. Next, use your barcode scanner to scan the barcode, and hit the **Locate** button. If a piece of equipment that matches exists in the system, it will be selected in the list.

At the bottom of the window, there are six other buttons corresponding with other functions that can be performed here:

- **New** button: Clicking on the **New** button allows you to enter a new piece of equipment into the program. See further down in this section for the topic “Entering a New Piece of Equipment” for a detailed discussion on how to enter equipment into EZ Maintenance.
- **Edit** button: The **Edit** button allows you to edit the information for an existing piece of equipment. Select the piece of equipment you want to edit by clicking on it, and then click on the **Edit** button. See further down in this section for the topic “Editing an Existing Piece of Equipment” for a detailed discussion on how to edit equipment.
- **Print** button: The **Print** button prints out a report showing all of the pieces of equipment you currently have entered into the program. For each piece of equipment, the report displays the equipment name (i.e. what type of equipment it is), what kind of maintenance is performed for it (the maintenance profile), its internal control number, its manufacturer serial number, and its equipment classification.

- **Usage Log:** Clicking on the **Usage Log** button allows you to enter usage logs for your equipment. See further down in this section for the topic “Entering and Printing Usage Logs” for a detailed discussion on how to enter usage logs.
- **Print Log:** Clicking on the **Print Log** button allows you to print the usage log for a selected piece of equipment. See further down in this section for the topic “Entering and Printing Usage Logs” for a detailed discussion on how to print usage logs.

When you are finished in the **Equipment Listing** window, click the **Close** button to exit.

Entering a New Piece of Equipment

As stated above, clicking on the **New** button at the **Equipment Listing** window allows you to enter a new piece of equipment into EZ Maintenance. After you click the **New** button you will be taken to the **Enter Maintenance Requirements** window:

The screenshot shows the 'Enter Maintenance Requirements' window with the following data:

Type	Elapsed Time Freq (Days)	Usage Frequency (Hrs)
30 Day	30	300.00000000
Annual	365	3000.00000000

In the upper-left corner of the window you will see two boxes named **Internal Control No.** and **Mfr. Serial No.** where you enter the internal control number and the manufacturer serial number for the piece of equipment respectively. The internal control number is a number which you arbitrarily assign to a piece of equipment in order to identify it. Click in each box and type in the internal control number and manufacturer serial number.

The close-up shows the following values in the input fields:

- Internal Control No. :** 305
- Mfr. Serial No. :** kjf76753

Below those two fields are six others called **Name**, **Brand**, **Model**, **Capacity**, **Classification**, and **Unit Location**:

Name :	elevator
Brand :	Liftronic
Model :	Turbo 1500
Capacity :	10 Person
Classification :	Customer Area
Unit Location :	Main Lobby

- The **Name** drop-down box is where you choose the equipment name for the piece of equipment you are entering. Click on the arrow to the right of the box to expand the drop-down menu and then click on your selection.
- The **Brand**, **Model** and **Capacity** fields are where you enter the brand of the equipment you are entering, the model name/number, and its capacity respectively. Click in each of the three boxes and then type your entry.
- The **Classification** drop-down box is where you choose a classification that aids you in tracking the piece of equipment. Click on the arrow to the right of the box to expand the drop-down menu and then click on your selection.
- The **Unit Location** field is where you enter the location of the piece of equipment you are entering. Click in the box and type the location of the piece of equipment.

In the upper right hand corner of the **Enter Maintenance Requirements** window are four more fields called **Start Date**, **Starting Usage**, **Maintenance Profile**, and **Description**:

Start Date	:	02/16/2007
Starting Usage	:	0.0
Maintenance Profile	:	
Description	:	

- The **Start Date** field is where you enter the date from which you want maintenance to begin being scheduled. Click on the box and type in the start date of maintenance.
- The **Starting Usage** field is used when you want to have the equipment's usage meter start with a value greater than zero. Click on the box and type in a positive number with one decimal place.
- The **Maintenance Profile** drop-down box is where you select what maintenance is to be performed on the piece of equipment you are entering (see further up in this chapter in the "Equipment Module Setup" topic for information on Maintenance Profiles). Click on the arrow to the right of the box to expand the drop-down menu and then click on the maintenance profile you want to use.
- The **Description** box automatically fills in with the description of the maintenance profile you selected.

Below those four fields is a **Comments** box into which you can type any comments you wish to add to this piece of equipment. Just click in the box and type any desired comments:

Comments :

Below the **Comments** box there are six fields and below that and a **Customize Captions** button:

Warranty Date	<input type="text" value="01/01/2010"/>	Maximum Load	<input type="text" value="3000 lbs"/>
Certified?	<input type="text" value="Yes"/>	Designation	<input type="text" value="Passenger"/>
Inspection Sche	<input type="text" value="30 Day / Annual"/>		<input type="text"/>
<input type="button" value="Customize Captions"/>			

The six fields have captions that are customizable. To change the captions, click on the **Customize Captions** button. This will pop up a window into which you can type the captions which you'd like to appear by the six fields:

Equipment Custom Captions

Enter caption for first label :	<input type="text" value="Warranty Date"/>
Enter caption for second label :	<input type="text" value="Maximum Load"/>
Enter caption for third label :	<input type="text" value="Certified?"/>
Enter caption for fourth label :	<input type="text" value="Designation"/>
Enter caption for fifth label :	<input type="text" value="Inspection Sche"/>
Enter caption for sixth label :	<input type="text"/>

Click in each field and type the captions you wish to appear by the six fields. When you are finished, click on the **Save** button to save the captions you chose, or click **Cancel** to discard your changes if you've changed your mind. Keep in mind that these customizable fields are not just for one specific piece of equipment and will display with the captions you chose anytime you are entering a new piece of equipment or editing one.

The next object on the window is a drop-down box called **Customer**:

Customer :

If you are entering a piece of equipment which you are servicing for a customer whom you have entered into EZ Maintenance (see Chapter 3 "General Setup and Alerts" for information on entering customers)

you can select that customer from the **Customer** drop-down menu. Click on the arrow to the right of the box to expand the drop-down menu and then click on the customer you'd like to choose.

Below the customer drop-down box there is a list of all of the maintenance events that are scheduled for the piece of equipment you are entering:

Type	Elapsed Time Freq (Days)	Usage Frequency (Hrs)
30 Day	30	0.00000000
Annual	365	0.00000000

This list fills in automatically depending on what maintenance profile you chose from the **Maintenance Profile** drop-down menu.

Lastly, there is a group of buttons in the lower right hand corner of the **Enter Maintenance Requirements** window:



- **Reproduce** button: clicking on the **Reproduce** button allows you to create a new piece of equipment exactly like the one you are entering except you must choose a new internal control number, manufacturers serial number and starting usage.
- **Print** button: clicking on the **Print** button produces a printed report with the details of the piece of equipment you have entered.
- **Delete** button: the **Delete** button allows you to delete the piece of equipment. When you click the **Delete** button, this pops up a small window that asks you to confirm whether or not you want to delete the piece of equipment. Click **Yes** to confirm and delete the piece of equipment, or click **No** if you have changed your mind and do not want to delete it.

Click on the **OK** button when you are finished entering the information for the new piece of equipment you want to enter, or click on **Cancel** to discard all information you have entered if you have changed your mind and you do not want to enter the piece of equipment into EZ Maintenance.

Editing an Existing Piece of Equipment

You can use the **Edit** button at the **Equipment Listing** window to change the information for a piece of equipment you currently have entered into EZ Maintenance. Select a piece of equipment from the list by clicking on it and then click on the **Edit** button. This will open the **Edit Maintenance Requirements** window:

Edit Maintenance Requirements

Equipment Unit ID
 Internal Control No.: 304
 Mfr. Serial No.: kjf76753

Equipment Unit Description
 Name: Elevator
 Brand: Liftronic
 Model: Turbo 1500
 Capacity: 10 Person
 Classification: Customer Area
 Unit Location: Main Lobby

Maintenance
 Start Date: 12/14/2004
 Starting Usage: 0.0
 Maintenance Profile: Elevator
 Description: Standard Maintenance for in

Comments: 10 Person capacity, in main customer / lobby area

Warranty Date: 01/01/2010
 Certified?: Yes
 Inspection Schedules: 30 Day / Annual
 Maximum Load: 3000 lbs
 Designation: Passenger

Customer: 3

Type	Elapsed Time Freq (Days)	Usage Frequency (Hrs)
30 Day	30	0.00000000
Annual	365	0.00000000

Buttons: Reproduce, Print, Delete, Cancel, Ok, Customize Captions

The **Edit Maintenance Requirements** window functions similarly to the **Enter Maintenance Requirements** window which you use to enter a new piece of equipment (see above “Entering a New Piece of Equipment”). In this window you can change all of the information you previously entered except for the internal control number (**Internal Control No.**), the manufacturer serial number (**Mfr. Serial No.**), the start date (**Start Date**), and the starting usage (**Starting Usage**).

When you are finished making the desired changes, click on the **OK** button to save the changes you made. If you have changed your mind, click on the **Cancel** button to discard any changes you’ve made.

Entering and Printing Usage Logs

You can use the **Usage Log** button on the **Equipment Listing** window to enter usage logs for your equipment. To start making log entries, select a piece of equipment for which you want to make an entry by clicking on it and then click on the **Usage Log** button. This will open the **Equipment Usage Log** window:

Log

Equipment Usage Log

Internal Control No.: Name:

Brand: Location:

Date	Meter	Usage (Hrs.)	Logged By	Operator	Job	Notes
12/14/04	0.00000000	0.0				
12/14/04	10.00000000	10.0	manager	Eric	Re-Stacking	Squeeking noise noted
12/16/04	15.00000000	5.0	manager	Eric	loading	
01/03/05	17.00000000	2.0	manager	Adam	re-stacking	Palette blade needs check
02/20/07	22.00000000	5.0	manager	Adam	loading	

At the top of the window there are four fields which display the internal control number for the piece of equipment for which you are entering usage log entries, the type of equipment this is (equipment name), the brand of the equipment and its location. Below that there is a listing of log entries that have been made so far:

Date	Meter	Usage (Hrs.)	Logged By	Operator	Job	Notes
12/14/04	0.00000000	0.0				
12/14/04	10.00000000	10.0	manager	Eric	Re-Stacking	Squeeking noise noted
12/16/04	15.00000000	5.0	manager	Eric	loading	
01/03/05	17.00000000	2.0	manager	Adam	re-stacking	Palette blade needs check
02/20/07	22.00000000	5.0	manager	Adam	loading	

Below the list of log entries there are five buttons: **New**, **Delete**, **Print**, **Cancel**, and **OK**. To create a new log entry, click on the **New** button. This will open up a window into which you enter the details of the new log entry:

The screenshot shows a software window titled "Log" with a subtitle "New Equipment Usage Log". The window contains the following fields and values:

- Int. Control Number: 605
- Date: 02/20/2007
- Last Meter Reading: 22.0 Hours
- Current Meter: 32.0 Hours
- Usage: 10.0 Hours
- Operator: Jason
- Job: loading
- Notes: No incidents to report

At the bottom right of the window, there are two buttons: "Cancel" and "OK".

The first field in this window (**Int. Control Number**) displays the internal control number of the piece of equipment for which you are making the log entry. The other fields in this window are:

- **Date:** This is where you enter the date of the log entry. Click on the box and type in the desired date in the format mm/dd/yyyy.
- **Last Meter Reading:** This field displays the total number of usage hours for the piece of equipment at the time of the last log entry. The number in this field cannot be changed.
- **Current Meter Reading:** This is where you enter the total number of hours that the equipment has been used since being entered in EZ Maintenance. Click on the box and type in the number of hours. Alternately, you can use the **Usage** field to log the number of hours since the last log entry (*see below*). Otherwise, making an entry in the **Current Meter Reading** box will automatically calculate and update the **Usage** box.
- **Usage:** This is where you enter the number of hours for which the equipment has been used since the last log entry. Click in the box and type the number of hours. The program will automatically add this number to the number in the **Last Meter Reading** box and update the **Current Meter Reading** box with the sum.
- **Operator:** This is where you enter the name(s) of the person/people who operated the piece of equipment for the hours which are being logged. Click in the box and type the names of the operators.
- **Job:** This is where you enter the job title of the person/people who operated the piece of equipment for the hours which are being logged. Click in the box and type the job designated.
- **Notes:** This is where you enter any comments on the log entry. Click in the box and type any comments you wish to add to the entry.

Once you are finished entering all of the information for the log entry, click on the **OK** button at the lower right hand corner of the window to add the log entry. If you have changed your mind and do not want to add the log entry, click on the **Cancel** button to discard any entries you have made and abort adding the log entry.

You can also delete log entries. At the **Equipment Usage Log** window, select the entry you want to delete by clicking on it with your mouse and then click on the **Delete** button.

If you want to print a list of the usage log entries for the piece of equipment, click on the **Print** button. This will pop up a small window:



The image shows a dialog box titled "Usage Log Report". Inside the dialog, the title "Usage Log" is centered at the top. Below the title, there are two text input fields: "Start Date" with the value "01/01/2004" and "End Date" with the value "01/01/2007". Below these fields is a button labeled "Log" with a small circular icon to its left. At the bottom of the dialog, there are two buttons: "Print" and "Cancel". The "Print" button is highlighted with a dashed border.

Here you have to enter a date range for the entries which you want to print. Type the lower end of the date range into the **Start Date** box and then type the upper end of the date range into the **End Date** box. Then click on the **Print** button. If you have changed your mind and don't want to print out the usage log entries, then click on the **Cancel** button.

When you are finished entering, viewing, or printing log entries at the **Equipment Usage Log** window, click on the **OK** button. If you want to exit this section and discard any of the changes you made to the log entries, then click on the **Cancel** button.

Maintenance Due

The Maintenance Due section of EZ Maintenance is where you can see upcoming maintenance events and work orders as well as create new work orders. To go to this section of the program, click on the **Maintenance Due** button under **Equipment Maintenance** on the EZ Maintenance main menu. This will open up a small window with three buttons including a **Close** button, clicking on which will bring you back to the EZ Maintenance main menu:

The other three buttons enable you to view what maintenance is due in three different ways:

- **By Equipment:** Clicking on the **By Equipment** button takes you to a section of the program where you can view maintenance due where all maintenance events are grouped together based on what piece of equipment they are for. See further down for the subtopic "Viewing Maintenance Due by Equipment" for in-depth information.
- **By Date:** Clicking on the **By Date** button takes you to a section of the program where you can view all maintenance events for all equipment organized in chronological fashion. See further down for the subtopic "Viewing Maintenance Due by Date" for in-depth information.
- **By Usage:** Clicking on the **By Usage** button takes you to a section of the program where you can view all maintenance events for all equipment sorted in order of how close each maintenance

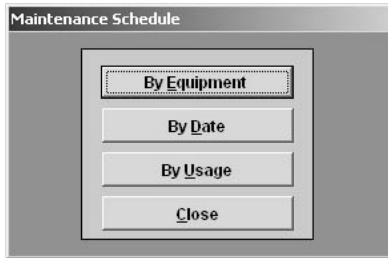


The image shows a dialog box titled "Maintenance Schedule". Inside the dialog, there are four buttons stacked vertically: "By Equipment", "By Date", "By Usage", and "Close". The "By Equipment" button is highlighted with a dashed border.

event is to being due based on the amount of usage hours logged for the piece of equipment. See further down for the subtopic “Viewing Maintenance Due by Usage” for in-depth information.

Viewing Maintenance Due by Equipment

One way of viewing upcoming and due maintenance events is “by equipment”. To view maintenance due by equipment, first click on the **Maintenance Due** button on the EZ Maintenance main menu. This will open up a small window with three buttons plus a **Close** button:



Click on the **By Equipment** button to view maintenance due by equipment. This will open up the **Maintenance Due Sorted by Equipment** window:

Locate

Equipment Name
 Internal Control No.
 Mfr. Sr. No.
 Maintenance Profile

Locate By Barcode

Internal Control No.
 Mfr. Sr. No.

Click column heading to sort

Equipment Name	Internal Control No.	Classification	Customer
Forklift	600	Warehouse	2
Forklift	605	Factory	2
computer	101	Office	1
computer	102	Office	1
elevator	304	Customer Area	3
light	502	Factory	3

Reports

Full Report
 Materials
 Operations
 Parts

Print Selected Work Orders

Select All WOs | Unselect All WOs

Work Order No.	To Print	Assigned To	Maintenance Type	Frequency (Days)	Next Due Date	Frequency (Usage)	Hours Till Next Maint.
6	<input type="checkbox"/>		Annual	365	12/14/05	0.0	0.0
8	<input type="checkbox"/>		30 Day	30	01/13/05	50.0	50.0
	<input type="checkbox"/>		Daily	1	12/15/04	50.0	50.0

New Unscheduled Work Order | Create/Edit Work Order | Assign Work Orders | Print List | Calendar | Close

Firstly, notice that all of the pieces of equipment you have currently have entered into EZ Maintenance are listed in the center of the window:

Equipment Name	Internal Control No.	Classification	Customer
Forklift	600	Warehouse	2
Forklift	605	Factory	2
computer	101	Office	1
computer	102	Office	1
elevator	304	Customer Area	3
light	502	Factory	3

Above the list of equipment there are two search boxes which you can use to locate a particular piece of equipment. The first and the leftmost of the two is a search box which you can use to locate a piece of equipment if you know its equipment name (what kind of equipment it is), its internal control number, its manufacturers serial number, or its maintenance profile:

A search interface with four radio buttons: Equipment Name, Internal Control No., Mfr. Sr. No., and Maintenance Profile. To the right is a text input field and a 'Locate' button.

To search for a piece of equipment, first click on one of the circles called **Equipment Name**, **Internal Control No.**, **Mfr. Sr. No.**, or **Maintenance Profile** depending on the search criterion you wish to use. Then click in the box to the right and type the equipment name, internal control number, manufacturer serial number, or maintenance profile depending on what selection you chose. Then click on the **Locate** button. If there is a piece of equipment currently entered in EZ Maintenance that matches your search term, it will be selected in the list below.

The other search box you can use to search for a particular piece of equipment is the barcode search box if the piece of equipment you are trying to locate in the software has a barcode label/sticker printed for it:

A search interface with two radio buttons: Internal Control No. and Mfr. Sr. No. To the right is a text input field.

To use this search box, first select whether the barcode you are scanning contains an internal control number or a manufacturer serial number by clicking on one of the circles called **Internal Control No.** or **Mfr. Sr. No.**. Then click in the box to the right and scan the barcode for the item you are trying to locate. Then hit the return key. The piece of equipment in EZ Maintenance that corresponds with that barcode will be selected.

When you select one of the pieces of equipment from the list in the middle of the window either by clicking on it or by using one of the aforementioned search functions, the list at the bottom of the window will be updated with the upcoming or due maintenance events for that piece of equipment:

Work Order No.	To Print	Assigned To	Maintenance Type	Frequency (Days)	Next Due Date	Frequency (Usage)	Hours Till Next Maint.
6	<input type="checkbox"/>	ravi	Annual	365	12/14/05	0.0	0.0
8	<input type="checkbox"/>	Jerry	30 Day	30	01/13/05	50.0	50.0
	<input type="checkbox"/>		Daily	1	12/15/04	50.0	50.0

For each maintenance event, the following data items are shown (going from left to right):

- **Work Order No.:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** If a work order has been created and it has been assigned to an employee, the name of the employee is displayed here.
- **Maintenance Type:** What kind of maintenance this scheduled event is.
- **Frequency (Days):** How frequently this maintenance occurs (in number of days).
- **Next Due Date:** When this maintenance is due to be performed. If the scheduled maintenance goes beyond the due date, the due date shown here will be shown in red text.
- **Frequency (Usage):** How frequently this maintenance occurs (in number of usage hours).
- **Hours Until Next Maint.:** The number of usage hours that must be logged for this piece of equipment until it is due for its next maintenance.

Also notice that between the **Work Order No.** column and the **Assigned To** column there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for scheduled maintenance events, the corresponding checkbox for that event must be checked.

To the right of the equipment listing is a box where you can print the work orders which you have selected:

At the left of the box are four options: **Full Report**, **Materials**, **Operations**, and **Parts**. Click on the circle next to **Full Report** if you want to print out the full details for each work order including all materials, operations, and parts prescribed in the work order. Click on **Materials**, **Operations**, or **Parts** if you only want the work orders to print with the materials, operations or parts prescribed in the work order. When you have chosen the desired option, then press the **Print Selected Work Orders** button to print the work orders which you have selected. You can also click on the **Select All WOs** button to select all work orders for all equipment, or you can click the **Unselect All WOs** button to ensure that all work orders for all equipment are not selected.

Lastly, at the bottom of the **Maintenance Due Sorted by Equipment** window, there are five buttons (plus a **Close** button that allows you to exit from this section of EZ Maintenance) corresponding with other tasks you can perform here:

- **New Unscheduled Work Order:** Click on the **New Unscheduled Work Order** button to create an unscheduled work order.

- **Create/Edit Work Order:** Select a maintenance event by clicking on it with your mouse and then click on the **Create/Edit Work Order** button to create a work order for that maintenance event. The **Create/Edit Work Order** button also allows you to edit work orders that are currently open. To do this, select a maintenance event from the list by clicking on it and then click on the **Create/Edit Work Order** button.
- **Assign Work Orders:** Click on the **Assign Work Orders** button to open up a window where you can see all scheduled maintenance events and easily assign them to personnel.
- **Print List:** Click on the **Print List** button to print a list of all upcoming maintenance events.
- **Calendar:** Click on the **Calendar** button to open up a window containing a calendar which lets you view the maintenance events due on any given day or during a specified date range.

When you are finished and wish to exit from the **Maintenance Due Sorted by Equipment** window, click on the **Close** button.

Viewing Maintenance Due by Date

One way of viewing upcoming and due maintenance events is “by date”. To view maintenance due by date, first click on the **Maintenance Due** button on the EZ Maintenance main menu. This will open up a small window with three buttons plus a **Close** button:



Click on the **By Date** button to view maintenance due by equipment. This will open up the **Maintenance Due Sorted by Date** window:

Locate

Mfr. Serial No. **Locate**

Internal Control No.

Work Order Number

Locate By Barcode

Mfr. Serial No.

Internal Control No.

Work Order Number

Click column heading to sort

Reports **Select Work Orders To Print**

Full Report

Materials

Operations

Parts

Next Due Date	W.O. Number	To Print	Assigned To	Int. Control No.	Mfr. Serial No.	Equipment Name	Maintenance Type	Frequency (Days)
12/15/04		<input type="checkbox"/>		605	hj567-f	Forklift	Daily	1.0
12/17/04	10	<input type="checkbox"/>	Jason	505	ge450	light	Daily	1.0
12/18/04		<input type="checkbox"/>		600	b587-g	Forklift	Daily	1.0
12/18/04	9	<input type="checkbox"/>	Eric	502		light	Daily	1.0
01/13/05		<input type="checkbox"/>		102		computer	30 Day	30.0
01/13/05	8	<input type="checkbox"/>	Jason	304	kjf76753	elevator	30 Day	30.0
01/13/05	7	<input type="checkbox"/>	Judith	101		computer	30 Day	30.0
01/13/05		<input type="checkbox"/>		605	hj567-f	Forklift	30 Day	30.0
01/16/05	6	<input type="checkbox"/>	Eric	600	b587-g	Forklift	30 Day	30.0

New Unscheduled Work Order **Create/Edit Work Order** **Assign Work Orders** **Print List** **Calendar** **Close**

Notice that in the middle of the window is a list of all upcoming and due maintenance events for all pieces of equipment you have entered in the program:

Next Due Date	W.O. Number	To Print	Assigned To	Int. Control No.	Mfr. Serial No.	Equipment Name	Maintenance Type	Frequency (Days)
12/15/04		<input type="checkbox"/>		605	hj567-f	Forklift	Daily	1.0
12/17/04	10	<input type="checkbox"/>	Jason	505	ge450	light	Daily	1.0
12/18/04		<input type="checkbox"/>		600	b587-g	Forklift	Daily	1.0
12/18/04	9	<input type="checkbox"/>	Eric	502		light	Daily	1.0
01/13/05		<input type="checkbox"/>		102		computer	30 Day	30.0
01/13/05	8	<input type="checkbox"/>	Jason	304	kj76753	elevator	30 Day	30.0
01/13/05	7	<input type="checkbox"/>	Judith	101		computer	30 Day	30.0
01/13/05		<input type="checkbox"/>		605	hj567-f	Forklift	30 Day	30.0
01/16/05	6	<input type="checkbox"/>	Eric	600	b587-g	Forklift	30 Day	30.0

For each maintenance event, the following data items are shown (going from left to right):

- **Next Due Date:** When this maintenance is due to be performed. If the scheduled maintenance goes beyond the due date, the due date shown here will be shown in red text.
- **W.O. No.:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** If a work order has been created and it has been assigned to an employee, the name of the employee is displayed here.
- **Int. Control No.:** This is the internal control for the piece of equipment for which this maintenance event is scheduled.
- **Mfr. Serial No.:** This is the manufacturer serial number for the piece of equipment for which this maintenance event is scheduled.
- **Equipment Name:** This is the equipment name (i.e. type of equipment) of the piece of equipment for which this maintenance event is scheduled.
- **Maintenance Type:** What kind of maintenance this scheduled event is.
- **Frequency (Days):** How frequently this maintenance occurs (in number of days).

By default, the list of maintenance events is sorted by **Next Due Date** in descending order. However, you can sort the list by any of the data items mentioned above by clicking on the column headers.

Above the list of scheduled maintenance events there are two search boxes which you can use to locate a particular piece of equipment or a work order. The first and the top of the two is a search box which you can use to locate a piece of equipment if you know its manufacturers serial number, its internal control number, or you can locate a work order:

Mfr. Serial No.

Internal Control No.

Work Order Number

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on the search criterion you wish to use. Then click in the box to the right and type the equipment manufacturer serial number or internal control number depending on what selection you chose. Then click on the **Locate** button. If there is a piece of equipment currently entered in EZ Maintenance that matches your search term, the first maintenance event for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and type the number of the work order which you want to search for. Then click on the **Locate** button. If a maintenance event has a work order matching the number you typed in the search box, it will be selected in the below list.

The second search box lets you search for a piece of equipment if you have a corresponding barcode label/sticker printed for it, and you can also look up a work order by scanning it:



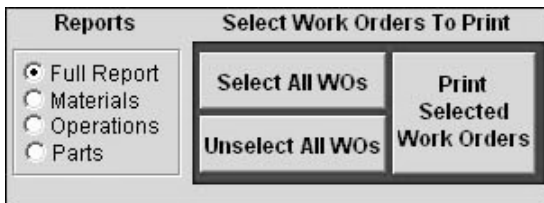
A search interface with three radio buttons on the left and a text input box on the right. The radio buttons are labeled: Mfr. Serial No., Internal Control No., and Work Order Number. The text input box is empty.

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on whether the barcode you are scanning contains a manufacturer serial number or an internal control number. Then click in the box to the right and scan the barcode, and then hit the return key. If there is a piece of equipment currently entered in EZ maintenance that corresponds with the barcode you scanned, the first maintenance event for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and scan the barcode at the top of the printed work order. If the work order you scanned is still open, it will be selected in the list below.

Also notice that between the **Work Order No.** column and the **Assigned To** column in the listing of maintenance events there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for scheduled maintenance events, the corresponding checkbox for that event must be checked.

Above and to the right of the equipment listing is a box where you can print the work orders which you have selected:



An interface titled "Reports" and "Select Work Orders To Print". On the left, under "Reports", there are four radio buttons: Full Report, Materials, Operations, and Parts. On the right, there are two buttons: "Select All WOs" and "Unselect All WOs" in the top row, and "Print Selected Work Orders" in the bottom row.

At the left of the box are four options: **Full Report**, **Materials**, **Operations**, and **Parts**. Click on the circle next to **Full Report** if you want to print out the full details for each work order including all materials, operations, and parts prescribed in the work order. Click on **Materials**, **Operations**, or **Parts** if you only want the work orders to print with the materials, operations or parts prescribed in the work order. When you have chosen the desired option, then press the **Print Selected Work Orders** button to print the work orders which you have selected. You can also click on the **Select All WOs** button to select all work orders for all equipment, or you can click the **Unselect All WOs** button to ensure that all work orders for all equipment are not selected.

Lastly, at the bottom of the **Maintenance Due Sorted by Date** window, there are five buttons (plus a **Close** button that allows you to exit from this section of EZ Maintenance) corresponding with other tasks you can perform here:

- **New Unscheduled Work Order:** Click on the **New Unscheduled Work Order** button to create an unscheduled work order.
- **Create/Edit Work Order:** Select a maintenance event by clicking on it with your mouse and then click on the **Create/Edit Work Order** button to create a work order for that maintenance event. The **Create/Edit Work Order** button also allows you to edit work orders that are currently open. To do this, select a maintenance event from the list by clicking on it and then click on the **Create/Edit Work Order** button.
- **Assign Work Orders:** Click on the **Assign Work Orders** button to open up a window where you can see all scheduled maintenance events and easily assign them to personnel.
- **Print List:** Click on the **Print List** button to print a list of all upcoming maintenance events.
- **Calendar:** Click on the **Calendar** button to open up a window containing a calendar which lets you view the maintenance events due on any given day or during a specified date range.

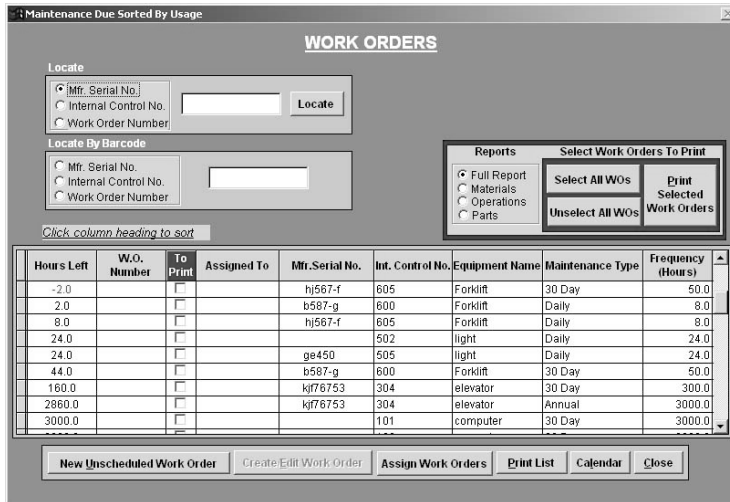
When you are finished and wish to exit from the **Maintenance Due Sorted by Date** window, click on the **Close** button.

Maintenance Due by Usage

One way of viewing upcoming and due maintenance events is “by equipment”. To view maintenance due by equipment, first click on the **Maintenance Due** button on the EZ Maintenance main menu. This will open up a small window with three buttons plus a **Close** button:



Click on the **By Usage** button to view maintenance due by usage. This will open up the **Maintenance Due Sorted by Usage** window:



Notice that in the middle of the window is a list of all upcoming and due maintenance events for all pieces of equipment you have entered in the program:

Hours Left	W.O. Number	To Print	Assigned To	Mfr. Serial No.	Int. Control No.	Equipment Name	Maintenance Type	Frequency (Hours)
-2.0		<input type="checkbox"/>		hj567-f	605	Forklift	30 Day	50.0
2.0		<input type="checkbox"/>		b587-g	600	Forklift	Daily	8.0
8.0		<input type="checkbox"/>		hj567-f	605	Forklift	Daily	8.0
24.0		<input type="checkbox"/>			502	light	Daily	24.0
24.0		<input type="checkbox"/>		ge450	505	light	Daily	24.0
44.0		<input type="checkbox"/>		b587-g	600	Forklift	30 Day	50.0
160.0		<input type="checkbox"/>		kj76753	304	elevator	30 Day	300.0
2860.0		<input type="checkbox"/>		kj76753	304	elevator	Annual	3000.0
3000.0		<input type="checkbox"/>			101	computer	30 Day	3000.0

For each maintenance event, the following data items are shown (going from left to right):

- **Hours Left:** This is the amount of usage hours that need to be logged until the piece of equipment is due for maintenance. If the amount of hours logged goes beyond the point at which the equipment is scheduled for maintenance, this number will be displayed as a negative number in red text showing the number of hours that have been logged since the piece of equipment became due for maintenance.
- **W.O. No.:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** If a work order has been created and it has been assigned to an employee, the name of the employee is displayed here.
- **Mfr. Serial No.:** This is the manufacturer serial number for the piece of equipment for which this maintenance event is scheduled.
- **Int. Control No.:** This is the internal control for the piece of equipment for which this maintenance event is scheduled.
- **Equipment Name:** This is the equipment name (i.e. type of equipment) of the piece of equipment for which this maintenance event is scheduled.
- **Maintenance Type:** What kind of maintenance this scheduled event is.
- **Frequency (Hours):** How frequently this maintenance occurs (in number of usage hours).

By default, the list of maintenance events is sorted by **Hours Left** in descending order. However, you can sort the list by any of the data items mentioned above by clicking on the column headers.

Above the list of scheduled maintenance events there are two search boxes which you can use to locate a particular piece of equipment or a work order. The first and the top of the two is a search box which you can use to locate a piece of equipment if you know its manufacturers serial number, its internal control number, or you can locate a work order:



A search interface with three radio buttons on the left: 'Mfr. Serial No.' (selected), 'Internal Control No.', and 'Work Order Number'. To the right is a text input box and a 'Locate' button.

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on the search criterion you wish to use. Then click in the box to the right and type the equipment manufacturer serial number or internal control number depending on what selection you chose. Then click on the **Locate** button. If there is a piece of equipment currently entered in EZ Maintenance that matches your search term, the first maintenance event for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and type the number of the work order which you want to search for. Then click on the **Locate** button. If a maintenance event has a work order matching the number you typed in the search box, it will be selected in the below list.

The second search box lets you search for a piece of equipment if you have a corresponding barcode label/sticker printed for it, and you can also look up a work order by scanning it:



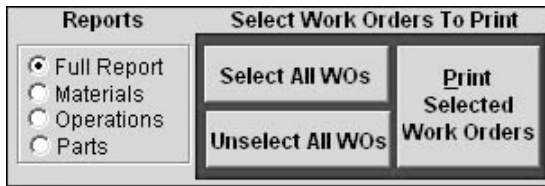
A search interface with three radio buttons on the left: 'Mfr. Serial No.', 'Internal Control No.', and 'Work Order Number'. To the right is a text input box.

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on whether the barcode you are scanning contains a manufacturer serial number or an internal control number. Then click in the box to the right and scan the barcode, and then hit the return key. If there is a piece of equipment currently entered in EZ maintenance that corresponds with the barcode you scanned, the first maintenance event for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and scan the barcode at the top of the printed work order. If the work order you scanned is still open, it will be selected in the list below.

Also notice that between the **Work Order No.** column and the **Assigned To** column in the listing of maintenance events there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for scheduled maintenance events, the corresponding checkbox for that event must be checked.

Above and to the right of the equipment listing is a box where you can print the work orders which you have selected:



At the left of the box are four options: **Full Report**, **Materials**, **Operations**, and **Parts**. Click on the circle next to **Full Report** if you want to print out the full details for each work order including all materials, operations, and parts prescribed in the work order. Click on **Materials**, **Operations**, or **Parts** if you only want the work orders to print with the materials, operations or parts prescribed in the work order. When you have chosen the desired option, then press the **Print Selected Work Orders** button to print the work orders which you have selected. You can also click on the **Select All WOs** button to select all work orders for all equipment, or you can click the **Unselect All WOs** button to ensure that all work orders for all equipment are not selected.

Lastly, at the bottom of the **Maintenance Due Sorted by Usage** window, there are five buttons (plus a **Close** button that allows you to exit from this section of EZ Maintenance) corresponding with other tasks you can perform here:

- **New Unscheduled Work Order:** Click on the **New Unscheduled Work Order** button to create an unscheduled work order.
- **Create/Edit Work Order:** Select a maintenance event by clicking on it with your mouse and then click on the **Create/Edit Work Order** button to create a work order for that maintenance event. The **Create/Edit Work Order** button also allows you to edit work orders that are currently open. To do this, select a maintenance event from the list by clicking on it and then click on the **Create/Edit Work Order** button.
- **Assign Work Orders:** Click on the **Assign Work Orders** button to open up a window where you can see all scheduled maintenance events and easily assign them to personnel.
- **Print List:** Click on the **Print List** button to print a list of all upcoming maintenance events.
- **Calendar:** Click on the **Calendar** button to open up a window containing a calendar which lets you view the maintenance events due on any given day or during a specified date range.

When you are finished and wish to exit from the **Maintenance Due Sorted by Usage** window, click on the **Close** button.

Equipment Work Orders

Two types of equipment work orders can be opened in EZ Maintenance:

1. Routine or “Scheduled” work orders: these are work orders for preventive maintenance that occurs on a periodic basis.
2. Non-routine emergency or “Unscheduled” work orders: these are work orders that are created for unexpected reasons like sudden equipment breakdowns. Unscheduled work orders are not scheduled but rather created as the need arises.

In this topic, both scheduled and unscheduled equipment work orders are discussed as well as a special feature you can use to easily and quickly assign work orders (see the subtopic “Assign Work Orders” below) and a maintenance calendar you can use to see what maintenance is due on any given day (see the topic “Maintenance Calendar” below)

Scheduled Equipment Work Orders

This section discusses how to open a scheduled equipment work order, how to close a scheduled work order, and how to change the materials, replacement parts, and operations prescribed in the work order.

Opening a Scheduled Work Order

To open a new scheduled work order, you must select a maintenance event by clicking on it and use the **Create / Edit Work Order** button when viewing maintenance either by equipment, by date, or by usage (see the topic further up in this chapter called “Maintenance Due” for more information on how to do this). This will take you to the work order window:

Modify Or Close Equipment Maintenance Work Order

Work Order

Work Order No.

Equipment: Brand: Location: Equipment Reference Notes:

Internal Control No.: Model: Log Usage meter Reading:

Manufacturer Serial No.: Capacity:

Notes: Ensure cable checking

Exceptions: Modifications to the standard pr

Performed By: Approved By: Assigned To:

Completion Date: Scheduled Actual Next Due Date:

Days since last service: Usage Meter: Usage since last service:

Work Order is Closed

All days Valid
 Sat, Sun Excluded
 Sun Only Excluded

Total Labor (hrs): Labor Cost: Parts and Materials Cost: Equipment Down Time(hrs):

Maintenance Profile: No. of Days: Maintenance Type:

Reports

Full Report
 Materials
 Operations
 Parts

Materials	Operations	Parts	Edit...
Material No.	Name	Quantity	
LB5	50 Watt Light Bulb	2.0	
10W-40	40 Weight motor Oil	5.0	

At the top right corner of the window you will see a field called **Work Order No.** that displays the number that this work order has been assigned:

Work Order No.

Work order numbers are integers and are automatically assigned to work orders by EZ Maintenance in sequential order starting with the number 1. As such, the first work order created would be work order #1, the second would be #2, the third would be #3, and so on and so forth.

Immediately below the work order number field, you'll see two tabs called **Equipment** and **Customer**. Clicking on the **Equipment** tab displays some data fields that give information about the piece of equipment for which you are creating the work order:

Equipment:	elevator	Brand:	Liftronic	Location:	Main Lobby	Equipment Reference Notes:	
Internal Control No.:	304	Model:	Turbo 1500	Log Usage meter Reading:		To be used only in warehouse area.	
Manufacturer Serial No.:	kj76753	Capacity:	10 Person		0.0		

- **Equipment:** This field displays the equipment name (i.e. the type of equipment)
- **Internal Control No.:** This field displays the internal control number.
- **Manufacturer Serial No.:** This field displays the manufacturer serial number.
- **Brand:** This is the brand of the piece of equipment.
- **Model:** This is the model name.
- **Capacity:** This is the capacity for the piece of equipment.
- **Location:** Where the piece of equipment is located.
- **Log Usage Meter Reading:** This is the current amount of usage hours logged for this piece of equipment.
- **Equipment Reference Notes:** Any comments entered about the piece of equipment will be displayed here.

Clicking on the **Customer** tab displays some data fields containing information about the customer for whom you are servicing this piece of equipment (unless the equipment is your own, in which case these fields would be blank). The customer ID number is shown in the **CUSTOMER** field as well as the vendor's name, their street address, city, state, zip code, and country:

CUSTOMER	2	NAME	Sim's Limo			
ADDRESS	55874 Lakeview Dr		CITY	Frazier Park	STATE/PROVINCE	CA
			ZIP/POSTAL CODE	94621-	COUNTRY	Us

Below the **Equipment** and **Customer** data fields and to the left there are also five fields which describe notes about the work order as well as who is creating the work order, who approved it, and to whom the work is actually assigned:

Notes:	<input checked="" type="checkbox"/>	Ensure cable checking
Exceptions:	<input checked="" type="checkbox"/>	Modifications to the standard pr
Performed By:		manager
Approved By:		MANAGER
Assigned To:		Jerry

- **Notes:** This is where you enter any notes about this work order. Click inside the box to the right and type any notes you wish to leave. The checkbox next to the field in which you type the notes will be automatically checked to indicate that there are notes for this work order.
- **Exceptions:** This is where you indicate that there are changes made to what is usually prescribed in this maintenance. Click inside the box to the right and type any exceptions you want to note. The checkbox next to the field in which you type exceptions will be automatically checked to indicate that there are exceptions for this work order.
- **Performed By:** This field displays who created the work order and is automatically filled in with the user name of the person who created it.
- **Approved By:** This field displays the person who approved the work order. The person approving the work order would click in this field, which causes a window to pop up prompting

them for their username and password. After their username and password have been entered, that users name will be displayed here as the person by whom this work was approved.

- **Assigned To:** From this drop-down box you choose the person to whom you want to assign to be responsible for the work indicated on the work order. Click on the arrow on the right side of the box to expand the list and then click on the person whom you want to assign the work.

To the right of the previous five fields are four pairs of data fields which relate to when the work was scheduled to be performed versus when it was actually performed:

	Scheduled	Actual
Completion Date:	03/24/2007	02/22/2007
Days since last service:	30	
Usage Meter	0.0	30.0
Usage since last service	0.0	30.0

- **Completion Date** (Scheduled and Actual): The left field in this pair shows the date on which the work was scheduled to be completed while the right shows the current date.
- **Days Since Last Service** (Scheduled and Actual): The left field in this pair shows the number of days that were supposed to have elapsed since the last service for the equipment to be due for maintenance while the right shows the number of days that have actually elapsed.
- **Usage Meter:** The left field in this pair shows the number of usage hours that were supposed to have been logged (for the entire life of the piece of equipment so far) for the equipment to be due for maintenance. In the right field you type the amount of total usage hours for which the piece of equipment has been operated. This may include usage hours between the last log entry and when this work order was created: in other words, usage hours that haven't been logged yet, in which case EZ Maintenance will calculate the difference between the amount you enter here and the last log entry and automatically make a new log entry containing that difference. Otherwise, you can simply enter the amount in that is contained in the **Log Usage Meter Reading** field above.
- **Usage since last service:** The left field in this pair shows the number of usage hours that were supposed to have been logged since the last time this piece of equipment was serviced for the equipment to be due for maintenance. The right field shows the actual amount of usage hours that have been logged since the last service.

To the right of these four pairs of fields is the date on which the next scheduled maintenance is due along with a few options that allow you to choose whether or not the maintenance will be scheduled on a weekend day or not:

Next Due Date

All days Valid

Sat,Sun Excluded

Sun Only Excluded

03/24/2007

Click on the circle called **All Days Valid** to allow scheduling on a weekend day if necessary. Click on the circle called **Sat,Sun Excluded** to disallow scheduling on either weekend day, or click on the circle called **Sun Only Excluded** to disallow scheduling on Sundays but allow on Saturdays. In any case, if the

scheduled maintenance is scheduled to fall on a day on which maintenance is disallowed to be scheduled, the maintenance will be scheduled on the last day possible before the day or days on which scheduling is disallowed. The date displayed will be changed to reflect the adjusted schedule if rescheduling is necessary.

Also on the work order window are four fields in which you can record the man hours worked for this maintenance (**Total Labor (hrs)**), the cost of the hours worked (**Labor Cost**), the cost of the parts and materials used in this maintenance (**Parts and Materials Cost**), and the amount of time the piece of equipment had to be taken offline to perform the maintenance (**Equipment Down Time(hrs)**). Click in any of these fields and type the desired values:

Total Labor (hrs):	<input type="text" value="2.0"/>	Parts and Materials Cost:	<input type="text" value="46.0"/>
Labor Cost:	<input type="text" value="50.0"/>	Equipment Down Time(hrs):	<input type="text" value="2.5"/>

Below those four fields you'll see three more fields that display the maintenance profile for the piece of equipment for which the work order is being created (**Maintenance Profile**), the type of maintenance that is being performed (**Maintenance Type**), and the frequency at which this maintenance occurs (**No. of Days**).

Maintenance Profile:	<input type="text" value="Elevator"/>	No. of Days:	<input type="text" value="30"/>
Maintenance Type:	<input type="text" value="30 Day"/>		

At the bottom of the work order window the materials used in the maintenance, the operations performed, and the parts to be checked and/or replaced are displayed. There are three tabs called **Materials**, **Operations**, and **Parts**. Clicking on the **Materials** tab displays a listing of all of the materials used in this maintenance:

Materials		Operations	Parts
Material No.	Name		Quantity
LB5	50 Watt Light Bulb		2.0
10W-40	40 Weight motor Oil		5.0

For each material listed on the work order the material number is displayed (**Material No.**), the name of the material is displayed (**Name**), and the quantity that is used (**Quantity**).

Clicking on the **Operations** tab shows the operations that are to be performed for this maintenance:

Materials		Operations		Parts
	Sequence No.	Operation Name	Operation Description	▲
	1	Replace Rollers	Memo	
	2	Perform Load Test	Memo	
				▼

For each operation, the sequence number is shown (**Sequence No.**), the name of the operation (**Operation Name**), and the description of the operation (**Operation Description**). If you double-click on the word “Memo” under the operation description column, it will pop up a window that displays the full description of the operation.

Lastly, clicking on the **Parts** tab shows the parts that are to be checked and/or replaced in this maintenance:

Materials		Operations		Parts
	Part Number	Part	Quantity	
	2G Cab	Elevator Support Cable	1.0	

For each part listed, the part number is shown (**Part Number**), the name of the part (**Part**), and the quantity to be replaced (**Quantity**) if indeed the part listed must be replaced.

Further on in this section we will show how to change the materials, parts, and operations listed on the work order.

You can also print this work order. At the right side of the work order window, there is a box titled **Reports**:

Reports

Full Report

Materials

Operations

Parts

Print

To the left of the box you will see four circles called **Full Report**, **Materials**, **Operations**, and **Parts**. By clicking on one of these circles, you can select whether you want to print the entire work order containing all of the materials operations and parts listed in the work order (**Full Report**), or whether you want to print a work order that contains only the materials, operations, or parts that are in the work order. Click on the circle that represents your choice, and then click on the **Print Selected** button to print the work order.

At the bottom of the work order window are the **OK** and **Cancel** buttons. When you have entered all of the information necessary for the work order and want to save it, click on the **OK** button. If you have changed your mind and do not want to create the work order, click on the **Cancel** button.

Closing a Scheduled Work Order

When the work that is prescribed in the work order has been physically completed and you want to mark the work order as closed, first check the checkbox in the center of the work order screen called **Work Order Is Closed**:

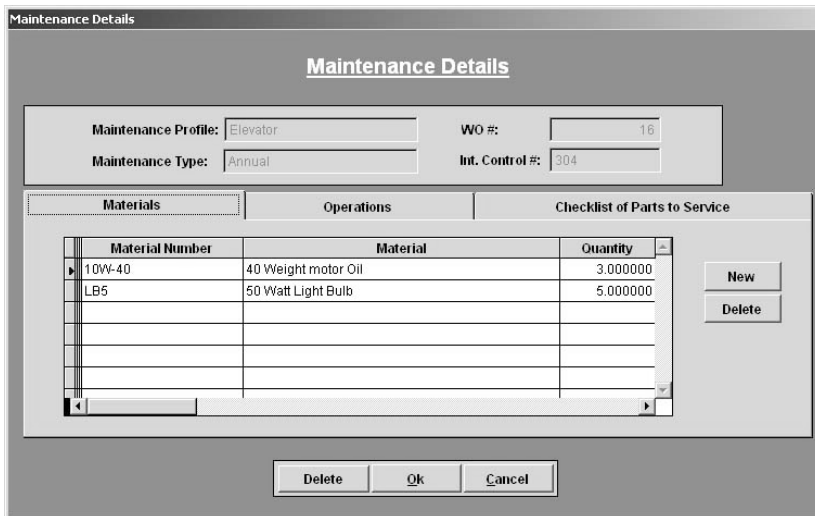
Work Order is Closed

After you have clicked on the **Work Order Is Closed** checkbox, then click on the **OK** button to save the work order and close it. The closed work order would then be added to the maintenance history (see further down in this chapter for the topic “Maintenance History / Work Order Approval” for more information on this).

If you would like to simply open a work order, and then save it without closing it, then just click on the **OK** button while leaving the **Work Order Is Closed** checkbox unchecked.

Changing the Materials, Parts, or Operations

You can change the materials, parts, and operations listed on a work order by using the **Edit** button which is on the right side of the work order window. Clicking on the **Edit** button will open up the **Maintenance Details** window:



The screenshot shows the 'Maintenance Details' window. At the top, there are four data fields: 'Maintenance Profile' (Elevator), 'Maintenance Type' (Annual), 'WO #' (16), and 'Int. Control #' (304). Below these fields is a table with three columns: 'Materials', 'Operations', and 'Checklist of Parts to Service'. The 'Materials' column is active, showing a list of materials with their respective quantities. The table has two rows of data: '10W-40' with a quantity of 3.000000 and 'LB5' with a quantity of 5.000000. There are 'New' and 'Delete' buttons to the right of the table. At the bottom of the window, there are 'Delete', 'OK', and 'Cancel' buttons.

Material Number	Material	Quantity
10W-40	40 Weight motor Oil	3.000000
LB5	50 Watt Light Bulb	5.000000

At the top of the window are four data fields: **Maintenance Profile**, which shows the maintenance profile of the piece of equipment for which this work order was created; **Maintenance Type**, which shows what type of maintenance this work order is for; **WO #**, which shows the number that was assigned to the work order; and **Int. Control #**, which shows the internal control number of the piece of equipment for which this work order was created.

Below those data fields you will see three tabs named “Materials”, “Operations”, and “Parts to Maintain”. Clicking on the **Materials** tab will display a list of the materials that are used in this work order: the material number, the material name, and the quantity used is displayed for each material.

Materials			Operations	Checklist of Parts to Service
Material Number	Material	Quantity		
▶ 10W-40	40 Weight motor Oil	3.000000		
LB5	50 Watt Light Bulb	5.000000		

To add a new material to the list, click on the **New** button. A new blank entry will be created in the materials list. To specify what material you want to add to the materials list, select its material number (how it is referred to in inventory) from the drop-down box in the **Material Number** column. The name of the material will automatically display in the **Material** column. After you’ve selected which material you want to add, then you must enter the quantity that is to be used in the maintenance: click on the cell in the column named **Quantity** and type in the desired quantity. To delete a material from the list, select it by clicking on it and then click on the **Delete** button.

If you click on the **Operations** tab, this will display the list of operations to be performed in this work order:

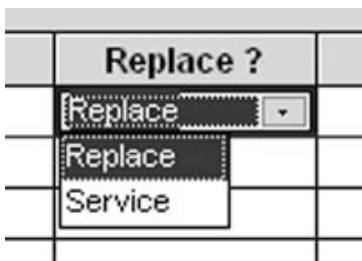
Materials			Operations	Checklist of Parts to Service
Sequence Number	Operation	Operation Description		
▶ 1	Replace Rollers	Memo		
2	Perform Load Test	Memo		

To add a new operation to the list, click on the **New** button. A new blank entry will be created in the operations list. Select the operation you wish to add to the list from the drop-down menu in the **Operation Name** column. Next specify what step # this operation is by clicking on the cell in the **Sequence Number** column and typing in the step #. You can delete an operation from the list by clicking on it to select it and then clicking on the **Delete** button.

Lastly, if you click on the **Checklist of Parts to Service** tab, this will display the list of parts to check and/or replace in this work order:

Materials	Operations		Checklist of Parts to Service
Sequence Number	Operation	Operation Description	
1	Replace Rollers	Memo	New Delete
2	Perform Load Test	Memo	

If you need to replace a malfunctioning part that was found during the inspection process of a work order, click on the area below the **Replace** column header and on the same row as the part you want to replace. This will expand a drop-down menu with two options, **Replace** and **Service**:



Click on **Service** if the part simply needs to be serviced, but not replaced with another. Click on **Replace** if you want to mark the part as needing to be replaced with another during this maintenance. Then click on the area below the **Quantity** header and on the same row as the part you want to replace and type in the amount of replacement parts you will need. When you close the work order, the amount you type here will be automatically deducted from your inventory of that part.

To add a new part to the list, click on the **New** button. Then select the number of the part (how it is referred to in inventory) from the drop-down menu in the **Part Number** column. The name of the part will automatically display to the right in the **Part** column. To delete a part from the list, select it by clicking on it and then clicking on the **Delete** button.

When you are finished changing the parts, materials, and operations in the work order, click on the **OK** button to save your changes. If you have changed your mind and do not want to save the changes you made, click on the **Cancel** button to discard any changes and return to the work order.

Unscheduled Equipment Work Orders

This section discusses how to open a scheduled equipment work order, how to change the materials, replacement parts, and operations prescribed in the work order, and how to edit and close the unscheduled work order.

Opening an Unscheduled Work Order

To open a new unscheduled work order, you must click on the **New Unscheduled Work Order** button when viewing maintenance either by equipment, by date, or by usage (see the topic further up in this

chapter called “Maintenance Due” for more information on how to do this). This will take you to the unscheduled work order window:

New Equipment Maintenance Work Order

Work Order

Work Order No. 12

Internal Control No.: 304 Brand: Liftronic Location: Main Lobby
 Manufacturer Serial No. kj76753 Model: Turbo 1500 **Equipment Reference Notes**
 Equipment: elevator Capacity: 10 Person 10 person capacity, customer area

Notes: Replace light bulb
 Exceptions: Modifications to the standard procedures n Actual Maintenance Date: 02/26/2007
 Performed By: manager
 Approved By: MANAGER Closed

Total Labor (hrs): 1.00 Parts and Materials Cost: 26.000000000000
 Labor Cost: \$40.0000 Equipment Down Time (hrs): 0.00

Maintenance Profile: Elevator Type: Annual

Material No.	Material	Quantity
10W/40	40 Weight motor Oil	3.000000
LB5	50 Watt Light Bulb	1.000000

Buttons: Cancel, Print, Ok

At the top right corner of the window you will see a field called **Work Order No.** that displays the number that this work order has been assigned:

Work Order No.
12

Work order numbers are integers and are automatically assigned to work orders by EZ Maintenance in sequential order starting with the number 1. As such, the first work order created would be work order #1, the second would be #2, the third would be #3, and so on and so forth.

Below that are some other data fields that show information about the piece of equipment for which you are creating the unscheduled work order:

Internal Control No.: 304 Brand: Liftronic Location: Main Lobby
 Manufacturer Serial No. kj76753 Model: Turbo 1500 **Equipment Reference Notes**
 Equipment: elevator Capacity: 10 Person 10 person capacity, customer area

First, however, you must select the piece of equipment for which you want to create the unscheduled work order by selecting either its internal control number from the **Internal Control No.** drop-down menu or its manufacturer serial number from the **Manufacturer Serial No.** drop-down menu. Click on the arrow next

to each of the boxes to expand each list, and then click on the internal control number or manufacturer serial number of the piece of equipment for which you want to create the work order. Notice that the other fields (whose meaning is described below) automatically fill in with information about the piece of equipment you have selected:

- **Equipment:** This field displays the equipment name (i.e. the type of equipment).
- **Brand:** This is the brand of the piece of equipment.
- **Model:** This is the model name.
- **Capacity:** This is the capacity for the piece of equipment.
- **Location:** Where the piece of equipment is located.
- **Equipment Reference Notes:** Any comments entered about the piece of equipment will be displayed here.

Below these data fields there are also four fields which describe notes about the work order as well as who is creating the work order and who approved it:

Notes :	<input checked="" type="checkbox"/>	Replace light bulb
Exceptions:	<input checked="" type="checkbox"/>	Modifications to the standard procedures n
Performed By :		manager
Approved By:		MANAGER

- **Notes:** This is where you enter any notes about this work order. Click inside the box to the right and type any notes you wish to leave. The checkbox next to the field in which you type the notes will be automatically checked to indicate that there are notes for this work order.
- **Exceptions:** This is where you indicate that there are changes made to what is usually prescribed in this maintenance. Click inside the box to the right and type any exceptions you want to note. The checkbox next to the field in which you type exceptions will be automatically checked to indicate that there are exceptions for this work order.
- **Performed By:** This field displays who created the work order and is automatically filled in with the user name of the person who created it.
- **Approved By:** This field displays the person who approved the work order. The person approving the work order would click in this field, which causes a window to pop up prompting them for their username and password. After their username and password have been entered, that users name will be displayed here as the person by whom this work was approved.

To the right there is a field displaying the date on which this work order is being created (**Actual Maintenance Date**). Below that there is a checkbox called **Closed**, which you can click on to check to close this work order (this will be discussed later).

Below that are four fields in which you can record the man hours worked for this maintenance (**Total Labor (hrs)**), the cost of the hours worked (**Labor Cost**), the cost of the parts and materials used in this maintenance (**Parts and Materials Cost**), and the amount of time the piece of equipment had to be taken offline to perform the maintenance (**Equipment Down Time (hrs)**). Click in any of these fields and type the desired values:

Total Labor (hrs):	1.00	Parts and Materials Cost:	26.0000000000
Labor Cost:	\$40.0000	Equipment Down Time (hrs):	0.00

Unscheduled work orders are created from scratch and are not for a specific kind of maintenance per se. As such, you will need to select what kind of maintenance this work order will contain. You can do this by selecting the type of maintenance you want to prescribe from the **Maintenance Profile** and **Type** drop-down boxes. Click on the arrow on the right side of each box to expand each and make your selection:

Maintenance Profile : Elevator **Type:** Annual

Once you have selected the maintenance profile and the maintenance type you want, the materials, parts, and operations included in the maintenance you selected will be automatically filled in in the **Materials**, **Operations**, and **Parts** lists below. Clicking on the **Materials** tab displays a listing of all of the materials used in this maintenance:

Materials			Operations	Parts
Material No.	Material	Quantity		
10W-40	40 Weight motor Oil	3.000000		
LB5	50 Watt Light Bulb	1.000000		

For each material listed on the work order the material number is displayed (**Material No.**), the name of the material is displayed (**Name**), and the quantity that is used (**Quantity**).

Clicking on the **Operations** tab shows the operations that are to be performed for this maintenance:

Materials		Operations		Parts
Sequence No.	Operation	Operation Description		
1	Replace Rollers	Memo		
2	Perform Load Test	Memo		

For each operation, the sequence number is shown (**Sequence No.**), the name of the operation (**Operation Name**), and the description of the operation (**Operation Description**). If you double-click on the word “Memo” under the operation description column, it will pop up a window that displays the full description of the operation.

Lastly, clicking on the **Parts** tab shows the parts that are to be checked and/or replaced in this maintenance:

Materials		Operations	Parts
	Part Number	Part	Quantity
	2G Cab	Elevator Support Cable	1.0

For each part listed, the part number is shown (**Part Number**), the name of the part (**Part**), and the quantity to be replaced (**Quantity**) if indeed the part listed must be replaced.

Finally, at the right side of the window there is an **Edit** button that you can use to change the materials, operations, or parts listed on the work order. We will describe how to do this further on in this section.

At the bottom of the window are three buttons: **Cancel**, **Print**, and **OK**. Clicking on the **Print** button will print out a full work order containing the details of the piece of equipment for which you are creating the work order as well as a complete list of materials, operations, and parts.

When you are finished in the unscheduled work order window, click on the **OK** button to create and save the work order. If you have changed your mind and do not want to create the unscheduled work order, then click on the **Cancel** button.

Changing the Materials, Parts, or Operations

You can change the materials, parts, and operations listed on the unscheduled work order by using the **Edit** button which is on the right side of the unscheduled work order window. Clicking on the **Edit** button will open up the **Maintenance Details** window:

Maintenance Details

Maintenance Profile: **WO #:**

Maintenance Type: **Int. Control #:**

Material Number	Material	Quantity
10W-40	40 Weight motor Oil	3.000000
LB5	50 Watt Light Bulb	5.000000

New **Delete**

Delete **OK** **Cancel**

At the top of the window are four data fields: **Maintenance Profile**, which shows the maintenance profile of the piece of equipment for which this work order was created; **Maintenance Type**, which shows what

type of maintenance this work order is for; **WO #**, which shows the number that was assigned to the work order; and **Int. Control #**, which shows the internal control number of the piece of equipment for which this work order was created.

At the bottom of the window you will see three tabs named “Materials”, “Operations”, and “Parts to Maintain”. Clicking on the **Materials** tab will display a list of the materials that are used in this work order: the material number, the material name, and the quantity used is displayed for each material.

Materials			Operations	Checklist of Parts to Service
Material Number	Material	Quantity		
▶ 10W-40	40 Weight motor Oil	3.000000		
LB5	50 Watt Light Bulb	5.000000		

To add a new material to the list, click on the **New** button. A new blank entry will be created in the materials list. To specify what material you want to add to the materials list, select its material number (how it is referred to in inventory) from the drop-down box in the **Material Number** column. The name of the material will automatically display in the **Material** column. After you’ve selected which material you want to add, then you must enter the quantity that is to be used in the maintenance: click on the cell in the column named **Quantity** and type in the desired quantity. To delete a material from the list, select it by clicking on it and then click on the **Delete** button.

If you click on the **Operations** tab, this will display the list of operations to be performed in this work order:

Materials			Operations	Checklist of Parts to Service
Sequence Number	Operation	Operation Description		
▶ 1	Replace Rollers	Memo		
2	Perform Load Test	Memo		

To add a new operation to the list, click on the **New** button. A new blank entry will be created in the operations list. Select the operation you wish to add to the list from the drop-down menu in the **Operation Name** column. Next specify what step # this operation is by clicking on the cell in the **Sequence Number** column and typing in the step #. You can delete an operation from the list by clicking on it to select it and then clicking on the **Delete** button.

Lastly, if you click on the **Parts to Maintain** tab, this will display the list of parts to check and/or replace in this work order:

Materials		Operations		Checklist of Parts to Service	
Part Number	Part	Replace ?	Qty		
2G Cab	Elevator Support Cable	Replace	1.00000		

If you need to replace a malfunctioning part that was found during the inspection process of a work order, click on the area below the **Replace** column header and on the same row as the part you want to replace. This will expand a drop-down menu with two options, **Replace** and **Service**:

Replace ?
<div style="border: 1px solid black; padding: 2px;"> Replace ▼ </div> <div style="border: 1px solid black; padding: 2px; margin-top: 2px;"> Replace </div> <div style="border: 1px solid black; padding: 2px; margin-top: 2px;"> Service </div>

Click on **Service** if the part simply needs to be serviced, but not replaced with another. Click on **Replace** if you want to mark the part as needing to be replaced with another during this maintenance. Then click on the area below the **Quantity** header and on the same row as the part you want to replace and type in the amount of replacement parts you will need. When you close the work order, the amount you type here will be automatically deducted from your inventory of that part.

To add a new part to the list, click on the **New** button. Then select the number of the part (how it is referred to in inventory) from the drop-down menu in the **Part Number** column. The name of the part will automatically display to the right in the **Part** column. To delete a part from the list, select it by clicking on it and then clicking on the **Delete** button.

When you are finished changing the parts, materials, and operations in the work order, click on the **OK** button to save your changes. If you have changed your mind and do not want to save the changes you made, click on the **Cancel** button to discard any changes and return to the work order.

Editing and Closing an Open Unscheduled Work Order

Once an unscheduled work order has been opened, you can return to the work order by viewing maintenance either by equipment, by date, or by usage and then selecting the work order by clicking on it and clicking on the **Create/Edit Work Order** button. This will open up the **Modify or Close Equipment (Existing) Maintenance Work Order** window:

Modify Or Close Equipment (Existing) Maintenance Work Order

Work Order

Work Order No.

Equipment: Brand: Location: Equipment Reference Notes:

Internal Control No.: Model: Log Usage meter Reading:

Manufacturer Serial No.: Capacity:

Notes: Replace light bulb

Exceptions: Modifications to the standard procedure

Performed By: Approved By: Assigned To:

Completion Date: Days since last service: Usage Meter: Usage since last service: Work Order is Closed:

Scheduled: Actual: Next Due Date:

All days Valid
 Sat, Sun Excluded
 Sun Only Excluded

Total Labor (hrs): Parts and Materials Cost: Labor Cost: Equipment Down Time (hrs):

Maintenance Profile: No. of Days: Maintenance Type:

Reports

Full Report
 Materials
 Operations
 Parts

Materials		Operations	Parts	Edit...
Material No.	Name		Quantity	
10W-40	40 Weight motor Oil		3.0	
LB5	50 Watt Light Bulb		1.0	

In this window you can make the changes you desire. For all intents and purposes, this window functions like the window used for scheduled work orders (see above section “Scheduled Work Orders”).

Unscheduled work orders can be closed in two ways: the first is by using the **Closed** checkbox in the window in which you originally created the unscheduled work order (see the beginning of this document):

Closed

You would use this method if you want to close the unscheduled work order immediately after opening it, so that you open and close the work order within the same window. To do this, click on the **Closed** checkbox to check it. Then click on the **OK** button. The work order will then be closed and will appear in your maintenance history (see further down in this chapter for the topic “Maintenance History / Work Order Approval” for more information on this).

The second method of closing an open unscheduled work order involves finding the work order by viewing maintenance either by equipment, by date, or by usage and then selecting the work order by clicking on it and clicking on the **Create/Edit Work Order** button. This will open the **Modify or Close Equipment (Existing) Maintenance Work Order** window, in the center of which you will see a checkbox called **Work Order Is Closed**:

Work Order is Closed

Click on the **Work Order Is Closed** checkbox to check it. Then click on the **OK** button. The work order will then be closed and will appear in your maintenance history (again, see further down in this chapter for the topic “Maintenance History / Work Order Approval” for more information on this).

Assign Work Orders

EZ Maintenance has a feature that allows you to view all upcoming and overdue maintenance events and quickly and easily create work orders for them and assign those work orders to the employee of your choice. Here, first the layout of this section of the program is described, and then it is explained how to use it to quickly and easily assign work orders.

When you view maintenance either by equipment, by date, or by usage, you will notice that at the bottom of the window in which you are viewing maintenance is a button called **Assign Work Orders**. Clicking on this button takes you a window in which you can view all upcoming and overdue maintenance events at a glance:

The screenshot shows a window titled "Maintenance Due" with a sub-header "WORK ORDERS". It features search filters for "Locate" (Mfr. Serial No., Internal Control No., Work Order Number) and "Locate By Barcode". A "Reports" section allows selecting "Full Report", "Materials", "Operations", or "Parts". A "Select Work Orders To Print" section includes "Select All WOs", "Unselect All WOs", and "Print Selected Work Orders". Below these is a table of maintenance events with columns: Next Due Date, Hours Till Next Maint, W.O. Number, Equipment Name, Int. Control No., Mfr. Serial No., Maintenance Type, Assigned To, and To Print. At the bottom are "Assign", "Print List", and "Close" buttons.

Next Due Date	Hours Till Next Maint	W.O. Number	Equipment Name	Int. Control No.	Mfr. Serial No.	Maintenance Type	Assigned To	To Print
12/15/04	50.0	6	Forklift	605	hj567-f	Daily	ravi	<input checked="" type="checkbox"/>
12/17/04	0.0		light	505	ge450	Daily		<input type="checkbox"/>
12/18/04	50.0		Forklift	600	b587-g	Daily		<input type="checkbox"/>
12/18/04	0.0	8	light	502		Daily	Manager	<input checked="" type="checkbox"/>
01/13/05	0.0	7	computer	102		30 Day	Jerry	<input checked="" type="checkbox"/>
01/13/05	0.0		elevator	304	kj76753	30 Day		<input type="checkbox"/>
01/13/05	0.0		computer	101		30 Day		<input type="checkbox"/>

Notice that in the center of the window you can see the list of all upcoming and overdue maintenance events:

Next Due Date	Hours Till Next Maint	W.O. Number	Equipment Name	Int. Control No.	Mfr. Serial No.	Maintenance Type	Assigned To	To Print
12/15/04	50.0	6	Forklift	605	hj567-f	Daily	ravi	<input checked="" type="checkbox"/>
12/17/04	0.0		light	505	ge450	Daily		<input type="checkbox"/>
12/18/04	50.0		Forklift	600	b587-g	Daily		<input type="checkbox"/>
12/18/04	0.0	8	light	502		Daily	Manager	<input checked="" type="checkbox"/>
01/13/05	0.0	7	computer	102		30 Day	Jerry	<input checked="" type="checkbox"/>
01/13/05	0.0		elevator	304	kj76753	30 Day		<input type="checkbox"/>
01/13/05	0.0		computer	101		30 Day		<input type="checkbox"/>

For each maintenance event, the following data items are shown (going from left to right):

- **Next Due Date:** When this maintenance is due to be performed. If the scheduled maintenance goes beyond the due date, the due date shown here will be shown in red text.
- **Hours Till Next Maint:** This is the amount of usage hours that need to be logged until the piece of equipment is due for maintenance. If the amount of hours logged goes beyond the point at which the equipment is scheduled for maintenance, this number will be displayed as a negative

number in red text showing the number of hours that have been logged since the piece of equipment became due for maintenance.

- **W.O. Number:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Equipment Name:** This is the equipment name (i.e. type of equipment) of the piece of equipment for which this maintenance event is scheduled.
- **Int. Control No.:** This is the internal control for the piece of equipment for which this maintenance event is scheduled.
- **Mfr. Serial No.:** This is the manufacturer serial number for the piece of equipment for which this maintenance event is scheduled.
- **Maintenance Type:** What kind of maintenance this scheduled event is.
- **Assigned To:** This box displays the person to whom this maintenance event / work order has been assigned. Further down in this section it will be explained how to use this to quickly and easily create work orders and assign to them to your personnel.

Above the list of maintenance events there are two search boxes which you can use to locate a particular piece of equipment or a work order. The first and the top of the two is a search box which you can use to locate a piece of equipment if you know its manufacturers serial number, its internal control number, or you can locate a work order:



The image shows a search interface with three radio buttons on the left: 'Mfr. Serial No.' (selected), 'Internal Control No.', and 'Work Order Number'. To the right of these buttons is a rectangular text input field. Further to the right is a button labeled 'Locate'.

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on the search criterion you wish to use. Then click in the box to the right and type the equipment manufacturer serial number or internal control number depending on what selection you chose. Then click on the **Locate** button. If there is a piece of equipment currently entered in EZ Maintenance that matches your search term, the first maintenance event for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and type the number of the work order which you want to search for. Then click on the **Locate** button. If a maintenance event has a work order matching the number you typed in the search box, it will be selected in the below list.

The second search box lets you search for a piece of equipment if you have a corresponding barcode label/sticker printed for it, and you can also look up a work order by scanning it:



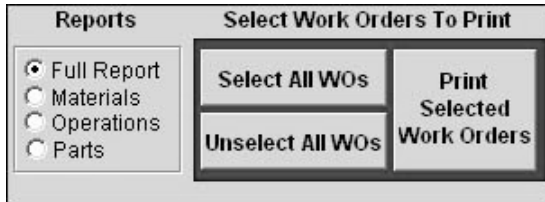
The image shows a search interface with three radio buttons on the left: 'Mfr. Serial No.', 'Internal Control No.', and 'Work Order Number'. To the right of these buttons is a rectangular text input field.

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on whether the barcode you are scanning contains a manufacturer serial number or an internal control number. Then click in the box to the right and scan the barcode, and hit the return key. If there is a piece of equipment currently entered in EZ maintenance that corresponds with the barcode you scanned, the first maintenance event for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and scan the barcode at the top of the printed work order. If the work order you scanned is still open, it will be selected in the list below.

Also notice that to the right of the **Assigned To** column in the listing of maintenance events there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for scheduled maintenance events, the corresponding checkbox for that event must be checked.

Above and to the right of the equipment listing is a box where you can print the work orders which you have selected:



At the left of the box are four options: **Full Report**, **Materials**, **Operations**, and **Parts**. Click on the circle next to **Full Report** if you want to print out the full details for each work order including all materials, operations, and parts prescribed in the work order. Click on **Materials**, **Operations**, or **Parts** if you only want the work orders to print with the materials, operations or parts prescribed in the work order. When you have chosen the desired option, then press the **Print Selected Work Orders** button to print the work orders which you have selected. You can also click on the **Select All WOs** button to select all work orders for all equipment, or you can click the **Unselect All WOs** button to ensure that all work orders for all equipment are not selected.

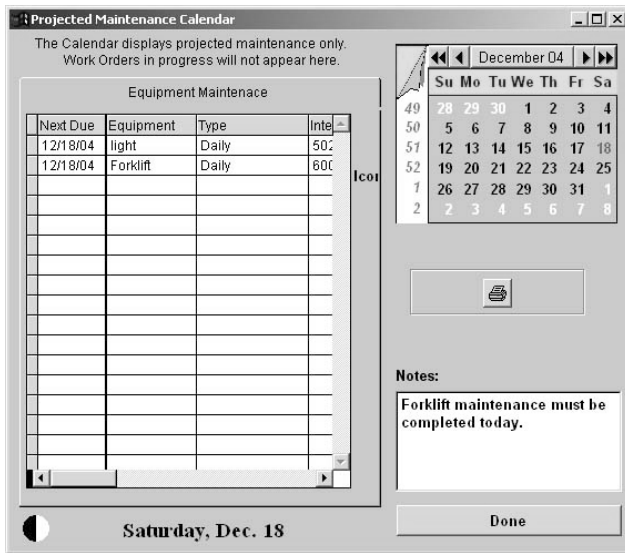
Lastly, at the bottom of the window, there are three buttons: **Assign**, **Print**, and **Close**. The function of the **Assign** button is explained further on in this section. Clicking on the **Print** button will print a complete list of all upcoming and overdue maintenance events including their corresponding work order number if a work order has been created for them. Click on **Close** when you are finished in this window to exit.

To quickly create work orders and assign them to personnel, you must use the drop-down boxes under the **Assigned To** column and the **Assign** button at the bottom of the window.

To create a work order for a maintenance event and assign it to somebody, first locate the maintenance event for which you want to create the work order in the list of upcoming and due maintenance events. Then look to the right of the drop-down box under the **Assigned To** column. Click on the small arrow on the right side of the box to expand the list of people to whom you can assign the work order, and then click on the person whom you want to assign the work order. Next, click on the **Assign** button. Notice that the maintenance event you have selected now has a corresponding work order number under the **W.O. Number** column. This means that the work order has been created and it is assigned to the person you selected. Repeat this procedure on any remaining maintenance events for which you want to create work orders and assign them to somebody.

Using the Maintenance Calendar

The calendar feature of EZ Maintenance allows you to view what maintenance events are due on any given day. The **Projected Maintenance Calendar** window is shown below:



At the left side of the window is a list of all the maintenance events that are scheduled for the day that is currently selected. This list shows only those maintenance events for which a work order has not yet been created:

Equipment Maintenance			
Next Due	Equipment	Type	Inte
12/18/04	light	Daily	502
12/18/04	Forklift	Daily	600

For each maintenance event you will see the following data items:

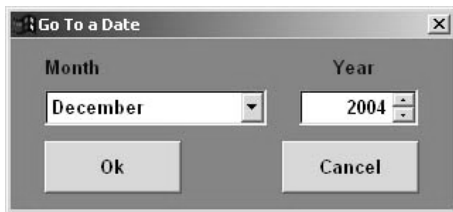
- **Next Due:** When this maintenance is due to be performed, which will be, of course, the date that is currently selected.
- **Equipment:** This is the equipment name (i.e. type of equipment) of the piece of equipment for which this maintenance event is scheduled.
- **Type:** What kind of maintenance this scheduled event is.
- **Internal #.:** This is the internal control for the piece of equipment for which this maintenance event is scheduled.
- **Mnf. Ser. #.:** This is the manufacturer serial number for the piece of equipment for which this maintenance event is scheduled.

At the upper right hand corner of the **Projected Maintenance Calendar** window is a calendar:



You can click on one of the actual days to select it, and the list of maintenance events on the left side of the window will be updated with the maintenance events that are due on that day. The day you selected will be highlighted in red text on the calendar itself, and it will also be displayed at the bottom of the window under the list of maintenance events.

To move forward a week, click on the upper left hand corner of the calendar. To move forward or backwards by one year, click on the >> or << buttons at the top of the calendar respectively. To move forward or backward by one month, click on the < or > buttons at the top of the calendar respectively. You can also go to any month of any year you wish by double clicking on any of the days in the calendar, which will pop up a window:



Click on the arrow on the right side of the drop-down box called **Month**, which will expand the list of months, and then click on the month you want to select. Then, in the box called **Year** either click in the box and type the year which you want to select or click on the up or down arrows on the right side of the box to advance the year forwards or backwards respectively. Click **OK** when you have selected your desired month and year, or click **Cancel** to abort.

Also notice that at the bottom left hand corner of the window there is a **Notes** box:



You can leave notes for any day by selecting a day from the calendar and then typing notes into this field. To leave notes, simply click inside the **Notes** box and then type your desired notes. Now when that date is selected in the future, those notes will be displayed.

Print Maintenance Due

Clicking on the **Print Maintenance Due** button on the main menu of EZ Maintenance takes you to the **Maintenance Due Report** window where you can print a report showing all upcoming and overdue maintenance events:

In this window you will see two fields called **Start Due Date** and **End Due Date**. These fields define the lower and upper date ranges of the report respectively: in other words, no maintenance events that come before the value typed in **Start Due Date** will be shown on the report, and no maintenance events that come after the value typed in **End Due Date** will be shown on the report. Click in each of the two boxes and type the dates you wish.

Once you have typed in the dates into the **Start Due Date** and **End Due Date** fields, click on the **Print** button to print the report. Otherwise, click on the **Cancel** button if you have changed your mind and do not want to print the report.



Maintenance History / Work Order Approval

Clicking on the **Maint. History View/Approve/Edit** button on the main menu of EZ Maintenance takes you to the **Approval** window where you can view the entire history of closed work orders for equipment maintenance, and where a supervisor can “sign off” on work orders to approve them:



Mfr. Serial No.	Equipment	Work Order No.	Assigned To	Mh.Date	Int.Control No.	Profile	Location	App. By
b587-g	Forklift	2	Manager	12/17/04	600	Fork Lift		MANAGER
b587-g	Forklift	3	Manager	12/17/04	600	Fork Lift		MANAGER
hj567-f	Forklift	4	Jerry	12/17/04	605	Fork Lift		MANAGER
	light	5	Manager	12/17/04	502	Celling Spot		MANAGER
hj567-f	Forklift	6	Jerry	02/27/07	605	Fork Lift		MANAGER
	light	7	ravi	02/27/07	502	Celling Spot		MANAGER

Notice that in the center of the window there is a list that shows the entire history of closed work orders for equipment maintenance:

Mfr. Serial No.	Equipment	Work Order No.	Assigned To	Mn.Date	Int.Control No.	Profile	Location	App. By	▲
b587-g	Forklift	2	Manager	12/17/04	600	Fork Lift		MANAGER	
b587-g	Forklift	3	Manager	12/17/04	600	Fork Lift		MANAGER	
hj567-f	Forklift	4	Jerry	12/17/04	605	Fork Lift		MANAGER	
	light	5	Manager	12/17/04	502	Ceiling Spot		MANAGER	
hj567-f	Forklift	6	Jerry	02/27/07	605	Fork Lift		MANAGER	
	light	7	ravi	02/27/07	502	Ceiling Spot		MANAGER	

For each closed work order in the list, there are the following data items (going from left to right):

- **Mfr. Serial No.:** This is the manufacturer serial number for the piece of equipment for which this work order was created.
- **Equipment:** This is the equipment name (i.e. type of equipment) of the piece of equipment for which this work order was created.
- **Work Order No.:** This is the number that was assigned to the work order.
- **Assigned To:** This is the person to whom the work order was assigned.
- **Mn. Date:** This is the maintenance date, namely the date on which the maintenance was performed, which is actually the date on which the work order was closed.
- **Int. Control No.:** This is the internal control for the piece of equipment for which this work order was created.
- **Profile:** This is the maintenance profile which defines the maintenance requirements for the piece of equipment for which this work order was created.
- **Location:** This is the location of the piece of equipment for which this work order was created.
- **App. By:** This is the person who signed off on the work order.

Further down in this section it is explained how to view additional details about these work orders, how to change some details if necessary, and how to “sign off” or approve a work order.

Above the list of closed equipment work orders is a search box which you can use to locate a piece of equipment if you know its manufacturers serial number, its internal control number, or you can locate a work order:

The search interface consists of three radio buttons on the left, a text input box in the center, and a 'Locate' button on the right. The radio buttons are labeled 'Mfr. Serial No.', 'Internal Control No.', and 'Work Order Number'. The 'Mfr. Serial No.' radio button is selected.

To search for a piece of equipment, first click on one of the circles called **Mfr. Serial No.** or **Internal Control No.** depending on the search criterion you wish to use. Then click in the box to the right and type the equipment manufacturer serial number or internal control number depending on what selection you chose. Then click on the **Locate** button. If there is a piece of equipment currently entered in EZ Maintenance that matches your search term, the first work order for that piece of equipment will be selected in the list below.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and type the number of the work order which you want to search for. Then click on the **Locate** button. If there is a work order in the history matching the number you typed in the search box, it will be selected in the below list.

Lastly, at the bottom of the window are two buttons: **Edit** and **Close**. To view the details of a particular work order or “sign off” on it, select the work order from the history list by clicking on it and then click on the **Edit** button (which will be discussed shortly). To exit the **Approval** window and return to the EZ Maintenance main menu, click on the **Close** button.

Work Order Approval / Editing

You can select a work order at the **Approval** window and then click on the **Edit** button to view additional details about these work orders, how to change some details if necessary, and how to “sign off” or approve a work order. You will be taken to the **Edit Approval** window:

The screenshot shows the 'Edit Approval' window with the following fields and values:

- Work Order No.:** 11
- Equipment:** elevator
- Manufacturer Serial No.:** kjf76753
- Maintenance Date:** 02/27/2007
- Internal Control No.:** 304
- Location:** (empty)
- Notes:** Ensure cable checking
- Exceptions:** Modifications to the stanc
- Scheduled Maintenance Date:** 02/28/2008
- Actual Maintenance Date:** 02/27/2007
- Customer:** Kane Confections
- Usage Meter:** 150.0
- Brand:** Liftronic
- Model:** Turbo 1500
- Capacity:** 10 Person
- Performed By:** manager
- Approved By:** MANAGER
- Assigned To:** Jerry
- Equipment Reference Notes:** 10 person capacity, main lobby customer area
- Total Labor (hrs):** 2.5
- Labor Cost:** 40.0
- Materials Cost:** 26.0
- Equipment Down Time (hrs):** 3.0
- Profile:** Elevator
- Type:** Annual
- Next Maintenance Due:** 02/27/2008
- How Often:** 365
- Buttons:** View Details, Full Report (selected), Materials, Operations, Parts, Print, OK, Cancel

At the top right corner of the window you will see a field called **Work Order No.** that displays the number that this work order has been assigned:

The close-up shows the 'Work Order No.' field with the value 11.

Below that are several fields giving information about the piece of equipment for which this work order was created:

The close-up shows the following equipment details fields:

- Equipment:** elevator
- Manufacturer Serial No.:** kjf76753
- Maintenance Date:** 02/27/2007
- Internal Control No.:** 304
- Location:** (empty)
- Brand:** Liftronic
- Model:** Turbo 1500
- Capacity:** 10 Person

- **Equipment:** This field displays the equipment name (i.e. the type of equipment).

- **Manufacturer Serial No.:** This field displays the manufacturer serial number.
- **Maintenance Date:** This is the maintenance date, namely the day on which the maintenance was performed, which is actually the date on which the work order was closed.
- **Internal Control No.:** This field displays the internal control number.
- **Location:** Where the piece of equipment is located.
- **Brand:** This is the brand of the piece of equipment.
- **Model:** This is the model name of the piece of equipment.
- **Capacity:** This is the capacity for the piece of equipment.

There are also two fields called **Notes** and **Exceptions**. The **Notes** field is where you include any details about the work order that aren't appropriate for any of the other data fields on the work order. The **Exceptions** field is where you note any deviations from the normal procedures or the normal materials or parts used in the work order. If you included any notes or exceptions when you initially opened the work order, they will simply be carried over and be displayed here. However, you can modify the contents of the **Notes** and **Exceptions** fields by clicking in them and typing the edits you'd like to make.

There are also three fields called **Performed By**, **Approved By**, and **Assigned To** which show, respectively, who created the work order, who approved it, and to whom it was assigned for completion. If each of these data items was entered when the work order was opened, those entries will simply be reflected here.

The image shows a form with three fields. The first field is labeled 'Performed By' and contains the text 'manager'. The second field is labeled 'Approved By' and contains the text 'MANAGER'. The third field is labeled 'Assigned To' and is a dropdown menu with 'Jerry' selected.

Clicking on the **Approved By** field pops up a small window into which the username and the password of the person approving the work order is entered:

The image shows a small dialog box titled 'Approve'. It has two input fields: 'User Name' with the value 'manager' and 'Password' with the value '*****'. Below the fields are two buttons: 'Ok' and 'Exit'.

Click in both the **User Name** and **Password** fields and type in the username and password respectively of the person approving the work order, then click on the **OK** button. If you have changed your mind and do not want to approve the work order, then click on the **Exit** button.

You can also mark the work order as having been assigned to somebody using the **Assigned To** drop-down box. Click on the arrow on the right side of the box which will expand the list, and then click on the person to whom you want to assign the work order. Please note that if you have already selected somebody to assign this work order to, this field will not be editable.

The **Equipment Reference Notes** field shows any notes or comments about the piece of equipment:

Equipment Reference Notes

10 person capacity, main lobby customer area

There are also two fields called **Scheduled Maintenance Date** and **Actual Maintenance Date** which show the date on which the maintenance for which this work order was created was scheduled to take place and the date on which the work order was closed and the work was completed:

Scheduled Maintenance Date :	02/28/2008
Actual Maintenance Date :	02/27/2007

The **Customer** field displays the ID of the customer for whom you are servicing this piece of equipment.

Customer	Kane Confections
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The **Usage Meter** field displays the total amount of usage hours that have been logged to this point:

Usage Meter	150.0
--------------------	-------

There are also four fields called **Total Labor (hrs)**, **Labor Cost**, **Materials Cost**, and **Equipment Down Time (hrs)**. Respectively, these fields display the total man hours worked during this maintenance, the total cost of the labor, the total cost of the materials used in the maintenance, and the amount of time for which the piece of equipment had to be taken offline for the maintenance to be completed.

Total Labor (hrs) :	2.5
Labor Cost :	40.0
Materials Cost :	26.0
Equipment Down Time (hrs) :	3.0

If you already entered the values for the **Total Labor (hrs)**, **Labor Cost**, **Materials Cost**, and **Equipment Down Time (hrs)** fields while the work order was still open, the values that you entered then will be reflected here. However, you can also edit these values as well or enter them if nothing has been entered yet. Just click in the boxes and type/edit the values you wish to record.

The last of the data fields in this window show what type of maintenance was performed for this work order (**Profile** and **Type**), the frequency of the maintenance (**How Often**), and when the next scheduled maintenance after the work order was scheduled to be completed (**Next Maintenance Due**).

Profile :	Elevator	
Type :	Annual	<input checked="" type="checkbox"/> Closed
Next Maintenance Due :	02/27/2008	How Often : 365

At the bottom of the window is a print function that allows you to print the closed work order:

View Details	<input checked="" type="radio"/> Full Report <input type="radio"/> Materials <input type="radio"/> Operations <input type="radio"/> Parts	Print	<input type="button" value="OK"/> <input type="button" value="Cancel"/>
---------------------	--	--------------	--

To the left of the box you will see four circles called **Full Report**, **Materials**, **Operations**, and **Parts**. By clicking on one of these circles, you can select whether you want to print the entire work order containing all of the materials operations and parts listed in the work order (**Full Report**), or whether you want to print a work order that contains only the materials, operations, or parts that are in the work order. Click on the circle that represents your choice, and then click on the **Print** button to print the work order.

At the bottom of the window are the **OK** and **Cancel** buttons. When you have finished making changes to the work order and wish to save them, click on the **OK** button. If you have changed your mind and do not want to save any changes, click on the **Cancel** button.

Lastly, there is the **View Details** button which you can use to view all of the materials, operations, and parts used in a work order. This is explained in the next part of this section.

View Details Button

Clicking on the **View Details** button on the **Approval** window takes you to the **Maintenance Details** window where you can view the materials, operations, and parts used in the work order:

Maintenance Details

Maintenance Details

Maintenance Profile: WO #:
Maintenance Type: Int. Control #:

Materials Required List of Operations Checklist of Parts to Service

Material Number	Material Name	Quantity
10W-40	40 Weight motor Oil	3.000000
LB5	50 Watt Light Bulb	1.000000

New
Delete

Close

At the top of the window are four data fields: **Maintenance Profile**, which shows the maintenance profile of the piece of equipment for which this work order was created; **Maintenance Type**, which shows what type of maintenance this work order is for; **WO #**, which shows the number that was assigned to the work order; and **Int. Control #**, which shows the internal control number of the piece of equipment for which this work order was created:

Maintenance Profile: WO #:
Maintenance Type: Int. Control #:

Below those data fields you will see three tabs named “Materials”, “Operations”, and “Parts to Maintain”. Clicking on the **Materials Required** tab will display a list of the materials that are used in this work order. The material number (**Material Number**), the material name (**Material Name**), and the quantity (**Quantity**) used is displayed for each material:

Materials Required List of Operations Checklist of Parts to Service

Material Number	Material Name	Quantity
10W-40	40 Weight motor Oil	3.000000
LB5	50 Watt Light Bulb	1.000000

New
Delete

If you click on the **List of Operations** tab, this will display the list of operations to be performed in this work order. The place in the sequence of operations that particular operation is placed is shown (**Sequence Number**) along with the name of the operation (**Operation Name**).

Materials Required		List of Operations	Checklist of Parts to Service
	Sequence Number	Operation Name	Operation Description
	1	Replace Rollers	Memo
	2	Perform Load Test	Memo

Lastly, if you click on the **Parts to Maintain** tab, this will display the list of parts to check and/or replace in this work order. The id number for the part which you use to identify it in inventory (**Part Code**) is shown along with the name of the part (**Part Description**).

Materials Required		List of Operations	Checklist of Parts to Service
	Part Code	Part Description	Serial No.
	2G Cab	Elevator Support Cable	

Print Maintenance History

EZ Maintenance has a feature that allows you to print a complete maintenance history for a particular piece of equipment. Clicking on the **Print Maintenance History** on the EZ Maintenance main menu takes you to a window that allows you to do this:

When selecting a piece of equipment for which you want to print a maintenance history, you will have to select either the internal control number of the manufacturer serial number for that piece of equipment.

Notice that in this window are two drop-down boxes called **Internal Control No.** and **Manufacturer Serial No.**. To choose a piece of equipment by selecting its internal control number, use the **Internal Control No.** drop-down box. Click on the arrow on the right side of the box to expand the list and then click on the internal control number of the piece of equipment for which you want to print a maintenance history.

Internal Control No. :
Manufacturer Serial No.:

Or, to choose a piece of equipment by selecting its manufacturer serial number, use the **Manufacturer Serial No.** drop-down box. Click on the arrow on the right side of the box to expand the list and then click on the manufacturer of the piece of equipment for which you want to print a maintenance history.

Once you have selected either an internal control number or a manufacturer serial number of a piece of equipment, then click on the **OK** button to print out the maintenance history for it. Otherwise, click on the **Cancel** button if you have changed your mind and would like to cancel printing.

Print Bar Coded Labels

EZ Maintenance has a feature that prints out bar coded labels (which can be printed as stickers) for the pieces of equipment you have entered into the program, which can then be found easily by “swiping” the barcode using search features found throughout EZ Maintenance. This feature is represented by the two buttons under **Print Bar Coded Labels** on the EZ Maintenance main menu.

The first button, namely the **Serial Number** button, takes you to a section of the program where you can print out bar coded labels that contain the serial number of a piece of equipment. The second button, namely the **Internal Control Number** button, takes you to a section of the program where you can print out bar coded labels that contain the internal control number of a piece of equipment.



Printing Bar Coded Labels with Serial Numbers

Clicking on the **Serial Number** button on the EZ Maintenance main menu opens up a window where you can print bar coded labels for pieces of equipment that contain their serial numbers

There are two options for printing the bar coded labels. You can print a sheet(s) containing one label for each piece of equipment, or you can print a single label for a selected piece of equipment. Notice that in the center of the window there are two circles called **Print All** and **Print Selected Serial Number**. If you want to print the sheet(s) containing one label for each piece of equipment, then click on the **Print All** circle.



However, if you want to print a single label for a selected piece of equipment, you must do two things. First, click on the **Print Selected Serial Number** circle. Notice that the drop-down box below that will turn from being inactive/“grayed out” to being active. Click on the arrow on the right side of the drop-down box to expand the list of serial numbers, and then click on the manufacturer serial number of the piece of equipment for which you want to print the bar coded label.

Once you have selected whether you want to print a sheet(s) containing one label for each piece of equipment or a single label for a selected piece of equipment, then click on the **Print** button to print the bar coded label(s). If you have changed your mind and do not want to print, then click on the **Cancel** button.

Printing Bar Coded Labels with Internal Control Numbers

Clicking on the **Internal Control Number** button on the EZ Maintenance main menu opens up a window where you can print bar coded labels for pieces of equipment that contain their internal control numbers.

There are two options for printing the bar coded labels. You can print a sheet(s) containing one label for each piece of equipment, or you can print a single label for a selected piece of equipment. Notice that in the center of the window there are two circles called **Print All** and **Print Selected Internal Control Number**. If you want to print the sheet(s) containing one label for each piece of equipment, then click on the **Print All** circle.

However, if you want to print a single label for a selected piece of equipment, you must do two things. First, click on the **Print Selected Internal Control Number** circle. Notice that the drop-down box below that will turn from being inactive/"grayed out" to being active. Click on the arrow on the right side of the drop-down box to expand the list of internal control numbers, and then click on the internal control number of the piece of equipment for which you want to print the bar coded label.

Once you have selected whether you want to print a sheet(s) containing one label for each piece of equipment or a single label for a selected piece of equipment, then click on the **Print** button to print the bar coded label(s). If you have changed your mind and do not want to print, then click on the **Cancel** button.

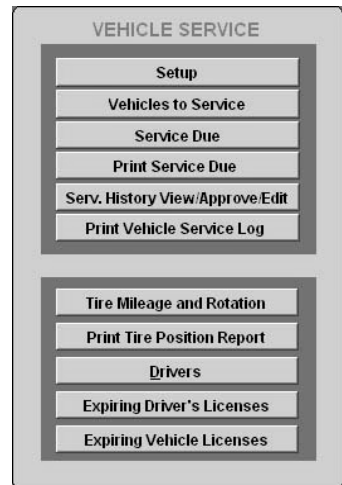


CHAPTER 5 – VEHICLE SERVICE MODULE

The Vehicle Service Module is the section of EZ Maintenance that you use to track and control maintenance for your vehicles. The Vehicle Module is represented by the eleven buttons on the right side of the EZ Maintenance main menu:

These eleven buttons represent actions you can perform within the Vehicle module:

- **Setup:** Clicking on the **Setup** button takes you to a section of the program where you setup the Vehicle Module. This must be done before you begin to track and control maintenance for your vehicles. See further down in this chapter for the topic “Vehicle Module Setup” for in-depth information.
- **Vehicles to Service:** Clicking on the **Vehicles to Service** button takes you to a section of the program where you enter your vehicles into EZ Maintenance. See further down in this chapter for the topic “Entering Vehicles & Usage Logs” for in-depth information.
- **Service Due:** Clicking on the **Service Due** button takes you to a section of the program where you can see upcoming maintenance events and open work orders and create work orders (both routine work orders and unscheduled work orders for unexpected break-downs). See further down in this chapter for the topic “Service Due” for in-depth information. Also see the topic “Vehicle Work Orders” for in-depth information on how to create work orders for vehicle maintenance.
- **Print Service Due:** Clicking on the **Print Service Due** button takes you to a section of the program where you can print a report showing all maintenance events that are due during a date range. See further down in this chapter for the topic “Print Service Due” for in-depth information.
- **Serv.History View/Approve/Edit:** Clicking on the **Serv.History View/Approve/Edit** button takes you to a section of the program where you can view the entire history of work orders for vehicles. See further down in this chapter for the topic “Service History / Work Order Approval” for in-depth information.
- **Print Vehicle Service Log:** Clicking on the **Print Vehicle Service Log** button takes you to a section of the program where you can print a complete work order history for a specific vehicle. See further down in this chapter for the topic “Print Vehicle Service Log” for in-depth information.
- **Tire Mileage and Rotation:** Clicking on the **Tire Mileage and Rotation** button takes you to a section of the program where you can track the mileage and rotation history for the tires on your vehicles. See further down in this chapter for the topic “Tire Mileage and Rotation” for in-depth information.
- **Print Tire Position Report:** Clicking on the **Print Tire Position Report** button takes you to a section of the program where you can print a complete tire rotation and mileage history for a specific tire. See further down in this chapter for the topic “Print Tire Position Report” for in-depth information.
- **Drivers:** Clicking on the **Drivers** button takes you to a section of the program where you can track your company’s drivers, their drivers licenses, and any incidents they have been involved in or any citations they have received. See further down in this chapter for the topic “Entering Drivers into EZ Maintenance” for in-depth information.
- **Expiring Drivers’ Licenses:** Clicking on the **Expiring Drivers Licenses** button takes you to a section of the program where you can print out a list of drivers licenses that are expiring within a number of days that you specify. See further down in this chapter for the topic “Expiring Drivers’ Licenses Report” for in-depth information.



- **Expiring Vehicle Licenses:** Clicking on the **Expiring Vehicle Licenses** button takes you to a section of the program where you can print out a list of vehicle licenses that are expiring within a number of days that you specify. See further down in this chapter for the topic “Expiring Vehicle Licenses Report” for in-depth information.

Vehicle Module Setup

The setup section of the Vehicle Module of EZ Maintenance is where you enter data which you will use later to specify the maintenance requirements for the vehicles that you enter into the program. To access this section of the program, click on the **Setup** button under **Vehicle Service** on the main menu of EZ Maintenance. This will open a window containing a menu of eight buttons plus a **Close** button that you can click on to return to the EZ Maintenance main menu.

Each of these seven buttons represents an action you can perform in this section of the program:

- **Vehicle Names:** Clicking on the **Vehicle Names** button takes you to a section of the program where you enter general names for the types of vehicles which you will choose from when entering new vehicles into the program. See further down in this section for the sub topic “Entering Vehicle Names” for in-depth information.
- **Vehicle Classifications:** Clicking on the **Vehicle Classifications** button takes you to a section of the program where you enter names for classifications that you can assign to your vehicles to aid you in tracking them. See further down in this section for the sub topic “Entering Vehicle Classifications” for in-depth information.
- **Service Types:** Clicking on the **Service Types** button takes you to a section of the program where you enter names that you give to scheduled recurring maintenance events. See further down in this section for the sub topic “Entering Service Types” for in-depth information.
- **Materials:** Clicking on the **Materials** button takes you to a section of the program where you enter into your inventory the materials which you use to perform maintenance on your vehicles. See further down in this section for the sub topic “Entering Materials” for in-depth information.
- **Parts:** Clicking on the **Parts** button takes you to a section of the program where you enter into your inventory replacement parts for your vehicles. See further down in this section for the sub topic “Entering Parts” for in-depth information.
- **Services:** Clicking on the **Services** button takes you to a section of the program where you can enter names for individual services that are done when performing one of the service types. See further down in this section for the sub topic “Entering Services” for in-depth information.
- **Operations:** Clicking on the **Operations** button takes you to a section of the program where you enter the operations you will perform when doing vehicle maintenance. See further down in this section for the sub topic “Entering Operations” for in-depth information.
- **Service Profiles:** Clicking on the **Service Profiles** button takes you to a section of the program where you can enter descriptions of maintenance for vehicles with similar maintenance requirements. See further down in this section for the sub topic “Entering Service Profiles” for in-depth information.



Entering Vehicle Names

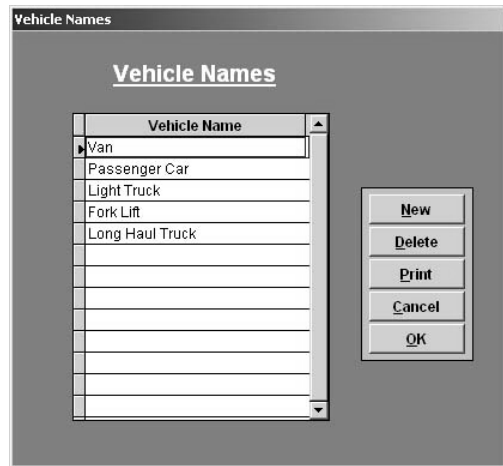
The **Vehicle Names** section of setup the Vehicle Module is where you enter the names that you will apply to each vehicle you enter into EZ Maintenance in order to identify what kind of vehicles you are working with. The vehicle names are entered into the **Vehicle Names** window:

To enter a new vehicle name, click on the **New** button. This will create a blank entry at the end of the list of vehicle names; type the new vehicle name and then hit the return key.

If you'd like to edit an existing vehicle name, select the one you'd like to edit by clicking on it with your mouse and type to make the desired change.

If you'd like to delete an existing vehicle name, select the one you'd like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered vehicle names by clicking on the **Print** button.



When you are finished working with vehicle names, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Vehicle Classifications

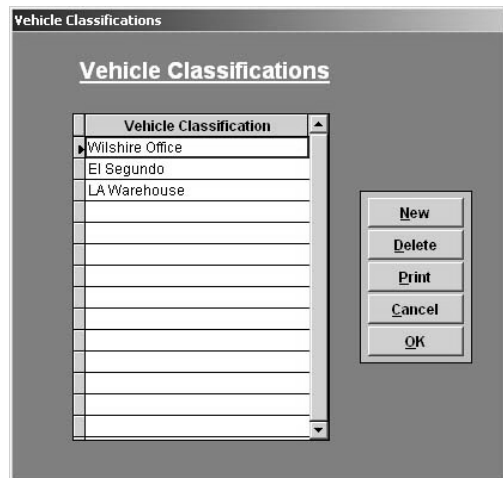
The **Vehicle Classifications** section of setup for the Vehicle Module is where you enter classification names which you apply to vehicles you enter into the program in order to aid you in tracking them. The classifications are entered into the **Vehicle Classifications** window:

To enter a new vehicle classification, click on the **New** button. This will create a blank entry at the end of the **Vehicle Classifications** list; type the new vehicle classification and then hit the return key.

If you'd like to edit an existing vehicle classification, select the one you'd like to edit by clicking on it with your mouse and type to make the desired change.

If you'd like to delete an existing vehicle classification, select the one you'd like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered vehicle classifications by clicking on the **Print** button.



When you are finished working with vehicle classifications, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Service Types

The **Service Types** section of setup for the Vehicle Service Module is where you enter names for regularly performed or emergency vehicle maintenance events. The service types are entered into the **Service Types** window:

To enter a new service type, click on the **New** button. This will create a blank entry at the end of the **Service Types** list; type the new service type and then hit the return key.

If you'd like to edit an existing service type, select the one you'd like to edit by clicking on it with your mouse and type to make the desired change.

If you'd like to delete an existing service type, select the one you'd like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

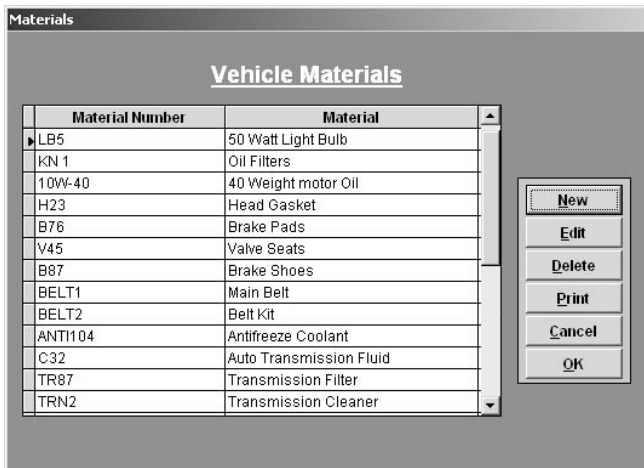
You can also print out a list of all of the currently entered service types by clicking on the **Print** button.



When you are finished working with service types, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Materials

The **Materials** section of the setup section for the Vehicle Maintenance module is where you enter the materials you expect to use in your vehicle maintenance. The materials you enter here are included in your inventory. The difference between entering your materials directly into the **Inventory** section of EZ Maintenance (see chapter 6 "Inventory Module") and entering them here is that, when you enter them here, they are automatically designated as being materials that are used only for vehicle maintenance.



Entering a New Material

To enter a new material, click on the **New** button. This will open up the **New Inventory** window where you will enter the details of the new material you are entering:

The screenshot shows a window titled "New Inventory" with a sub-header "New Inventory Information". The form contains the following fields:

Item Number:	<input type="text"/>	ID Code 1:	<input type="text"/>
Item Name/Description	<input type="text"/>	ID Code 2:	<input type="text"/>
Date:	<input type="text" value="02/28/2007"/>	Inventory Type:	<input type="text" value="Material"/>
Preferred Vendor:	<input type="text"/>	Equip. or Vehicle:	<input type="text" value="Vehicle"/>
Manufacturer:	<input type="text"/>	Quantity on Hand:	<input type="text"/>
Unit:	<input type="text"/>	Minimum Level:	<input type="text"/>
Cost:	<input type="text"/>	Maximum Level:	<input type="text"/>
% Markup:	<input type="text"/>	Reorder Quantity:	<input type="text"/>
Price:	<input type="text"/>	Warehouse Location:	<input type="text"/>
Long Description:	<input type="text"/>		

At the bottom of the window are three buttons: "Print", "OK", and "Cancel".

Notice that the drop-down selection boxes for **Inventory Type** and **Equip. or Vehicle** have already been selected with "Material" and "Vehicle" respectively; as you might expect, if you change these, the item will not appear in the **Materials** section of the **Vehicle Module Setup**.

To enter data into each of these fields (except for **Preferred Vendor**, **Inventory Type**, **Equip. or Vehicle**), just click inside the box and type your entry. The **Preferred Vendor**, **Inventory Type**, and **Vehicle** fields are drop-down boxes; to enter data into these, click on the arrow on the right side of each to expand the list and then select your desired entry. The table below summarizes the meaning of each of these data items:

Item Number: This is a unique code that identifies the item. Although you can enter any characters into this field, it is recommended that you choose a brief code that consists of only letters and digits.

Name/Description: Enter a name or a short description of the item here.

Date: Enter the date on which tracking for this item began.

Preferred Vendor: From the drop-down box, select the vendor from whom you prefer to order this item. For a vendor to be a selection here, you must have entered them into the Vendors section of EZ Maintenance.

Manufacturer: Enter the manufacturer of the item you are entering.

Unit: Enter the name of the unit which you are using to measure the quantity of this item (e.g. "gallons", "bundles").

Cost: Enter the cost per unit for this item.

ID Code 1: If you have another ID code by which you track an inventory item, enter it here.

ID Code 2: If you have another ID code by which you track an inventory item, enter it here.

Inventory Type: From the drop-down box, select whether the item is a material, a part, or neither.

Equip. or Vehicle: Select whether the inventory item is used in only equipment maintenance, only vehicle maintenance, or whether it is used in both.

Quantity on Hand: Enter the quantity of the item you currently have in your actual inventory.

Minimum Level: Enter the lowest quantity of this item you want to allow. If the amount on hand of the inventory item goes below this level, it will be flagged as low on the inventory listing window.

Maximum Level: Enter the highest quantity of this item you want to allow. If you create a purchase order in which you order an amount of this item that would cause it to go above the maximum level, you will be warned that you are ordering too many.

% Markup: If you sell items directly out of your inventory, then this is the extra percentage you charge the customer.

Price: This is the price of the item plus the markup percentage, the full price you will charge a customer if you sell them the item directly from your inventory.

Long Description: A longer and more detailed explanation of the item.

Reorder Quantity: Enter the quantity in which you want new orders of this item to be made. When you are creating a purchase order containing this inventory item, the reorder quantity for it will be shown to guide the user placing the order.

Warehouse Location: Enter the actual physical location where this item is stored.

Please note that if you have not yet entered any vendors into EZ Maintenance, no selections will appear in the **Preferred Vendor** drop-down menu. See chapter 6 “Inventory Module” for information on how to enter your materials and parts vendors into EZ Maintenance.

If you want to print a report showing all of the details of the material you’ve entered, click on the **Print** button.

When you are finished entering the information for the new material, click on the **OK** button to save the new material. If you have changed your mind and you do not want to enter the new material, then click on the **Cancel** button.

Editing an Existing Material

To edit an existing material, at the **Materials** window, select the material you want to edit by clicking on it with your mouse and then clicking on the **Edit** button. This will open up the **Modify Inventory Information** window.

Modify Inventory Information			
Item Number:	0100	ID Code 1:	0549-0
Name/Description:	Heavy Oil	ID Code 2:	0-967343-0L
Date:	12/15/2004 <input type="checkbox"/> Active	Inventory Type:	Material
Preferred Vendor:	Napa	Equip. or Vehicle:	Both
Manufacturer:	Lubritech		
Unit:	Ounces	Quantity on Hand:	15.0
Cost:	\$0.500000	Minimum Level:	15.0
% Markup:	0.000000	Maximum Level:	50.0
Price:	\$0.500000	Reorder Quantity:	20.0
Long Description:	Heavy Oil for packing ball bearings etc.	Warehouse Location:	Back room

Print OK Cancel

When you are finished changing the information for the material, click on the **OK** button to save your changes. If you want to exit and discard all of the changes you’ve made, then click on the **Cancel** button.

Deleting an Existing Material

To delete an existing material, at the **Materials** window, select the material you want to delete by clicking on it with your mouse and then clicking on the **Delete** button. This will pop up a small window asking you to confirm that you indeed want to delete the material: click on **Yes** to proceed with deleting the material or click on **No** if you have changed your mind and do not want to delete the material.

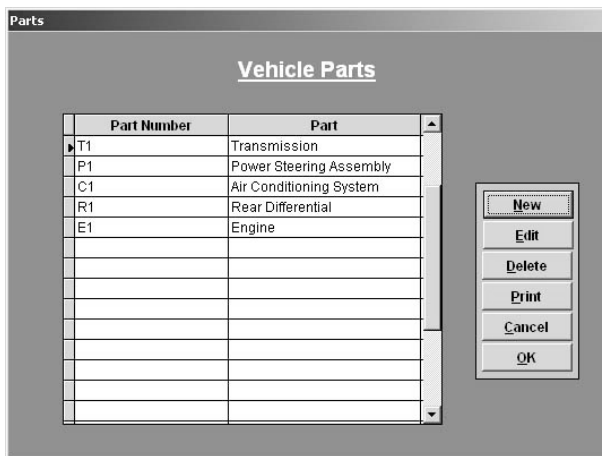
Printing a List of Materials

You can also print out a list of the materials that you use for vehicle maintenance by clicking on the **Print** button.

When you are finished entering materials, click on the **OK** button. Clicking on the **Cancel** button exits without saving any changes.

Entering Replacement Parts for Vehicle Maintenance

The **Parts** section of the setup section for the Vehicle Maintenance module is where you enter the parts you expect to use in your vehicle maintenance. The parts you enter here are included in your inventory. The difference between entering your parts directly into the **Inventory** section of EZ Maintenance (see chapter 6 “Inventory Module”) and entering them here is that, when you enter them here, they are automatically designated as being parts that are used only for vehicle maintenance.



Entering a New Part

To enter a new part, click on the **New** button. This will open up the **New Inventory** window where you will enter the details of the new part you are entering:

Notice that the drop-down selection boxes for **Inventory Type** and **Equip. or Vehicle** have already been selected with “Part” and “Vehicle” respectively; as you might expect, if you change these, the item will not appear in the **Parts** section of the **Vehicle Module Setup**.

To enter data into each of these fields (except for **Preferred Vendor**, **Inventory Type**, **Equip. or Vehicle**), just click inside the box and type your entry. The **Preferred Vendor**, **Inventory Type**, and **Vehicle** fields are drop-down boxes; to enter data into these, click on the arrow on the right side of each to expand the list and then select your desired entry. The table below summarizes the meaning of each of these data items:

Item Number: This is a unique code that identifies the item. Although you can enter any characters into this field, it is recommended that you choose a brief code that consists of only letters and digits.

Name/Description: Enter a name or a short description of the item here.

Date: Enter the date on which tracking for this item began.

Preferred Vendor: From the drop-down box, select the vendor from whom you prefer to order this item. For a vendor to be a selection here, you must have entered them into the Vendors section of EZ Maintenance.

Manufacturer: Enter the manufacturer of the item you are entering.

Unit: Enter the name of the unit which you are using to measure the quantity of this item (e.g. “gallons”, “bundles”).

Cost: Enter the cost per unit for this item.

% Markup: If you sell items directly out of your inventory, then this is the extra percentage you charge the customer.

Price: This is the price of the item plus the markup percentage, the full price you will charge a customer if you sell them the item directly from your inventory.

ID Code 1: If you have another ID code by which you track an inventory item, enter it here.

ID Code 2: If you have another ID code by which you track an inventory item, enter it here.

Inventory Type: From the drop-down box, select whether the item is a material, a part, or neither.

Equip. or Vehicle: Select whether the inventory item is used in only equipment maintenance, only vehicle maintenance, or whether it is used in both.

Quantity on Hand: Enter the quantity of the item you currently have in your actual inventory.

Minimum Level: Enter the lowest quantity of this item you want to allow. If the amount on hand of the inventory item goes below this level, it will be flagged as low on the inventory listing window.

Maximum Level: Enter the highest quantity of this item you want to allow. If you create a purchase order in which you order an amount of this item that would cause it to go above the maximum level, you will be warned that you are ordering too many.

Reorder Quantity: Enter the quantity in which you want new orders of this item to be made. When you are creating a purchase order containing this inventory item, the reorder quantity for it will be shown to guide the user placing the order.

Warehouse Location: Enter the actual physical location where this item is stored.

Long Description: A longer and more detailed explanation of the item.

Please note that if you have not yet entered any vendors into EZ Maintenance, no selections will appear in the **Preferred Vendor** drop-down menu. See chapter 6 “Inventory Module” for information on how to enter your materials and parts vendors into EZ Maintenance.

If you want to print a report showing all of the details of the part you’ve entered, click on the **Print** button.

When you are finished entering the information for the new part, click on the **OK** button to save the new part. If you have changed your mind and you do not want to enter the new part, then click on the **Cancel** button.

Editing an Existing Part

To edit an existing part, at the **Parts** window, select the part you want to edit by clicking on it with your mouse and then clicking on the **Edit** button. This will open up the **Modify Inventory Information** window.

Modify Inventory Information			
Item Number:	E1	ID Code 1:	T823792
Name/Description:	Engine	ID Code 2:	56/79123
Date:	12/14/2004	Inventory Type:	Replacement Part
Preferred Vendor:	Bob's	Equip. or Vehicle:	Vehicle
Manufacturer:	Toyota	Quantity on Hand:	1.0
Unit:	Engine	Minimum Level:	1.0
Cost:	\$2,000,000,000	Maximum Level:	2.0
% Markup:	2,500,000	Reorder Quantity:	1.0
Price:	\$2,050,000,000	Warehouse Location:	LA
Long Description:	Toyota truck engine.		

Print OK Cancel

When you are finished changing the information for the part, click on the **OK** button to save your changes. If you want to exit and discard all of the changes you’ve made, then click on the **Cancel** button.

Deleting an Existing Part

To delete an existing part, at the **Parts** window, select the part you want to delete by clicking on it with your mouse and then clicking on the **Delete** button. This will pop up a small window asking you to confirm that you indeed want to delete the part: click on **Yes** to proceed with deleting the part or click on **No** if you have changed your mind and do not want to delete the part.

Printing a List of Parts

You can also print out a list of the parts that you use for vehicle maintenance by clicking on the **Print** button.

When you are finished entering parts, click on the **OK** button. Clicking on the **Cancel** button exits without saving any changes.

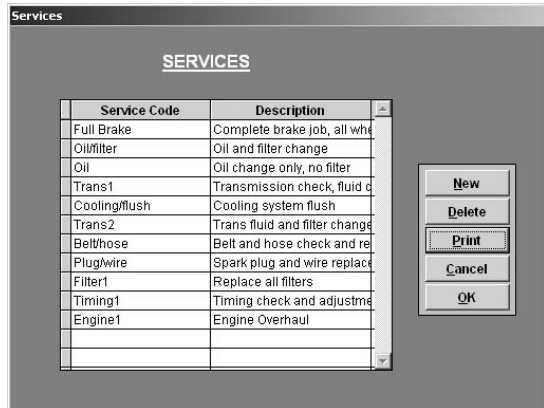
Entering Services

The **Services** section of setup for the Vehicle Module is where you enter individual services that must be carried out when a service type is performed (see further up for the subtopic “Service Types”). The services are entered into the **Services** window:

Each service that you enter must include two items: a code for the service (a short or abbreviated name) and a description of the service itself.

To enter a new service, click on the **New** button. This will create a blank entry at the end of the services list; type a service code and then hit the return key. After hitting the return key, the cursor will be placed in the area immediately to the right of where you typed the service name, which is in the **Description** column. Here, type a description of the service you just entered.

You can also edit existing services. To edit a service code, simply click on the service code you’d like to change and then type to make your changes. You can edit a description for a service similarly.



If you’d like to delete an existing service, select the one you’d like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered services by clicking on the **Print** button.

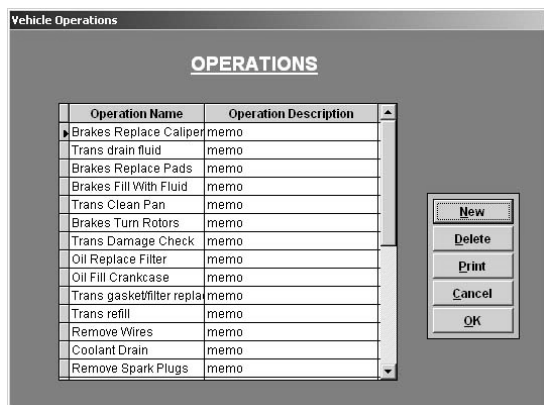
When you are finished working with services, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Operations

The **Operations** section of setup for the Vehicle Module is where you enter names and descriptions for operations performed during the completion of a service (see above for the subtopic “Services”). The operations are entered into the **Vehicle Operations** window:

To enter a new operation, click on the **New** button. This will create a blank entry at the end of the operations list; type the new operation name and then hit the return key.

After you’ve created a new operation, you must also create a description for the operation. To do this, double click on the word “memo” to the right of the operation; this will pop up a window into which you will type the operation description. Type in the description and then click on the **Close** button when you are finished. Notice that the word “memo” to the right of your



new operation is now spelled with a capital ‘M’. The capital ‘M’ indicates that the operation has a corresponding description. It is important to create a description for every operation because the operation description is printed on work orders.

You can also edit existing operations. To edit an operation name, simply click on the name you’d like to change and then type to make your changes. To edit a description for an operation, double click on the word “memo” (or “Memo”), type to make your changes, and then click the **Close** button when finished.

If you’d like to delete an existing operation, select the one you’d like to delete by clicking on it with your mouse and then clicking on the **Delete** button.

You can also print out a list of all of the currently entered operations by clicking on the **Print** button.

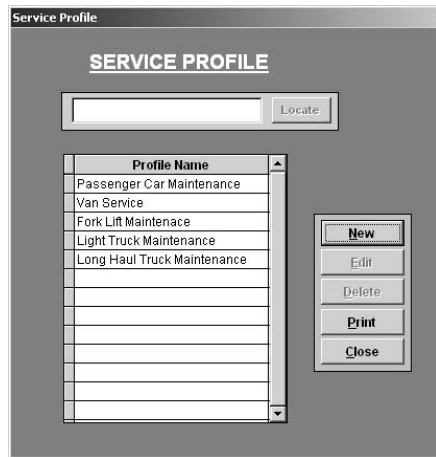
When you are finished working with operations, click on the **OK** button to exit and accept all of the changes you made. If you want to exit and discard all of the changes you made, then click on the **Cancel** button.

Entering Service Profiles

The **Service Profiles** section of EZ Maintenance is where you enter descriptions of what maintenance is performed on vehicles and how frequently it is performed. Service profiles are not meant for a one specific vehicle, but rather they are applied to a group of vehicles all sharing the same maintenance requirements.

There are four main operations that you can perform from the **Service Profile** window:

- **Create a New Service Profile:** Click on the **New** button to start creating a new service profile. See further down in this section of the manual for further explanation on creating a new service profile.
- **Edit a Service Profile:** Select a service profile by clicking on it, and then click on the **Edit** button to make changes to the service profile you selected.
- **Delete a Service Profile:** To delete a service profile, select a service profile by clicking in it and then clicking on the **Delete** button.
- **Print a List of All Service Profiles:** You can print a list of all of the service profiles currently entered into EZ Maintenance by clicking on the “Print” button.



When you are finished working with service profiles, you may click the **Close** button within the **Service Profile** window.

Creating a New Service Profile

As described above, to begin creating a new vehicle service profile, click on the **New** button within the **Service Profile** window. This will open the **Vehicle Service Profile Details** window:

Vehicle Service Profile

Profile Name :

Description :

Type	No. of Months	Usage Units	Comments

New
Edit
Delete Line

Ok Delete Print Cancel

Before you can proceed here, you must enter a name for the new service profile in the **Profile Name** box by clicking on it and then typing in the name. You can also enter a description of the service profile into the **Description** box if you wish.

In the middle of the window you will see two tabs called **List of Required Services** and **Checklist of On Board Parts & Supplies**. The first tab we will discuss is the **Checklist of On Board Parts & Supplies**. Clicking on this tab opens up a list of items that you need to ensure that you have before performing this maintenance:

Checklist

Flashlight
Medical Kit
Car Jack
Jumper Cables
Tool box

New
Delete Line
Print

Note that the items that are in this list are not inventory items. Rather, this list is appropriate for listing tools and other items that are used in the maintenance but not “used up”. To add a new item to the list, click on the **New** button to the right of the list. This will add a blank entry to the end of the list and place the cursor in it; type the name of the item that you’d like to include on the checklist.

If you want to delete an item from the list, click on the item you wish to delete and then click on the **Delete Line** button. To print a copy of the checklist, click on the **Print** button.

Next, if we click on the **List of Required Services** tab, this will display a list of all of the actual service types that are to be performed in this maintenance profile:

List of Required Services				Checklist of On Board Parts & Supplies	
Type	No. of Months	Usage Units	Comments		
Routine Maintenance	3	3000			
Cooling System Maintenance	6	6000	This is especially important in cold climates.		
Transmission Maintenance	12	12000	Do this immediately if transmission slips.		
Hydraulics Maintenance	36	36000	If brake pedal sinks to the floor before the vehicle stops.		

The types themselves are listed in the **Type** column, as well as—for each one--the frequency in which it is scheduled to occur in number of months (**No. of Months**), the usage units that need to be logged after which it becomes due (**Usage Units**), and any comments left about each (**Comments**).

Notice that to the left of the service types there are three buttons:

- **New:** clicking on the **New** button lets you add a new service type to the profile. This will be explained in depth further down in this section.
- **Edit:** You can edit an existing service type by selecting it from the list by clicking on it and then clicking on the **Edit** button. If there are no service types currently in the list or you do not have one selected currently, the button will be inactive and “Edit” will be displayed in gray text.
- **Delete:** You can delete an existing service type by selecting it from the list by clicking on it and then clicking on the **Delete** button.

At the bottom of the window are four more buttons:

- **OK:** Click the **OK** button to save your changes and return to the **Service Profile** window.
- **Delete:** Clicking on the **Delete** button will delete the service profile you are currently entering or editing and return you to the **Service Profile** window.
- **Print:** Clicking on the **Print** button will print out a report showing all of the services currently entered in this service type.
- **Cancel:** Clicking on the **Cancel** button exits back to the **Vehicle Service Profile Details** window without saving your changes.

Adding a Service Type to a Profile

Clicking on the **New** button in the **Vehicle Service Profile Details** window opens up the **Add Service Profile Detail** window where you enter details about the new service type:

Add Service Profile Detail

Service Profile Detail

Type:

SERVICE FREQUENCY

Every months, or every usage units (for example, miles), whichever comes first

Comments:

Service Code	Service Description

New
Edit
Delete

Ok Delete Print Cancel

Before you can proceed here you first must select a name for the service type you are adding from the **Type** drop-down box. Click on the small arrow to the right side of the box to expand it and then click on a selection.

Next you will need to enter the frequency at which the maintenance is performed; you will need to enter the frequency in terms of both time (in months) and usage (in a unit you've arbitrarily chosen). The maintenance will be scheduled to be performed based on which ever of the two is met first:

SERVICE FREQUENCY

Every months, or every usage units (for example, miles), whichever comes first

Comments:

To enter the time frequency at which this maintenance is performed, click in the box to the left and then type in the number of months. To enter the usage frequency at which this maintenance is performed, click in the right box and then type in the number of hours.

You can also enter any comments about this maintenance into the **Comments** box by clicking in it and then typing any desired comments.

Below that you will see a list of the individual services:

Service Code	Service Description
Trans1	Transmission check, fluid change
Trans2	Trans fluid and filter change

New
Edit
Delete

For each service listed the **Service Code** is displayed along with the **Service Description**, and to the right of the list of services there are three buttons:

- **New**: clicking on the **New** button lets you add a new service to the profile. This will be explained further down in this section (“Adding a Service to a Service Type”).
- **Edit**: You can edit an existing service by selecting it from the list by clicking on it and then clicking on the **Edit** button. If there are no services currently in the list or you do not have one selected currently, the button will be inactive and “Edit” will be displayed in gray text.
- **Delete**: You can delete an existing service by selecting it from the list by clicking on it and then clicking on the **Delete** button. If there are no services currently in the list or you do not have one selected currently, the button will be inactive and “Delete” will be displayed in gray text.

At the bottom of the window are four more buttons:

- **OK**: Click the **OK** button to save your changes and return to the **Vehicle Service Profile Details** window.
- **Delete**: Clicking on the **Delete** button will delete the service type you are currently entering or editing.
- **Print**: Clicking on the **Print** button will print out a report showing all of the services currently entered in this service type.
- **Cancel**: Clicking on the **Cancel** button exits back to the **Vehicle Service Profile Details** window without saving your changes.

Adding a Service to a Service Type

Clicking on the **New** button on the **Vehicle Service Profile Details** window opens up the **Service Details** window:

The screenshot shows the 'Service Details' window. At the top, it says 'Service Details' in the title bar. Below that, the window title is 'Vehicle Service Profile Details'. There are two input fields: 'Service Code' with a dropdown arrow and 'Service Description' with a text box. Below these are three tabs: 'Materials', 'Operations', and 'Parts to Service'. The 'Materials' tab is active, showing a table with columns 'Material Number', 'Material', and 'Quantity'. To the right of the table are 'New' and 'Delete' buttons. At the bottom of the window are 'OK', 'Delete', and 'Cancel' buttons.

Material Number	Material	Quantity

Before you can proceed here, you must first select the service code from the **Service Code** drop-down box. Click on the arrow on the right side of the box to expand the list and select the service code you want.

You can also add a description for this service to the **Service Description** box. Just click inside the box and type the description.

Next, we must enter the materials to be used, the parts to be maintained, and the operations to be performed in this maintenance. In the middle of the window you will see three tabs named “Materials”, “Operations”, and “Parts to Service”. Clicking on the **Materials** tab will display a list of the materials that are used in this maintenance: the material number, the material name, and the quantity used is displayed for each material.

Materials		Operations	Parts to Service
Material Number	Material	Quantity	
C32	Auto Transmission Fluid	4.0	
TR87	Transmission Filter	1.0	
TRN2	Transmission Cleaner	1.0	

To add a new material to the list, click on the **New** button. A new blank entry will be created in the materials list. To specify what material you want to add to the materials list, select its material number (how it is referred to in inventory) from the drop-down box in the **Material Number** column. The name of the material will automatically display in the **Material** column. After you’ve selected which material you want to add, then you must enter the quantity that is to be used in the maintenance: click on the cell in the column named **Quantity** and type in the desired quantity. To delete a material from the list, select it by clicking on it and then click on the **Delete** button.

If you click on the **Operations** tab, this will display the list of operations to be performed during this maintenance:

Materials		Operations	Parts to Service
Sequence Number	Operation	Operation Description	
1	Trans drain fluid	memo	
2	Trans Clean Pan	memo	
3	Trans gasket/filter replace	memo	
4	Trans refill	memo	

To add a new operation to the list, click on the **New** button. A new blank entry will be created in the operations list. Select the operation you wish to add to the list from the drop-down menu in the **Operation** column. Next specify what step # this operation is by clicking on the cell in the **Sequence No.** column and typing in the step #. You can delete an operation from the list by clicking on it to select it and then clicking on the **Delete** button.

Lastly, if you click on the **Parts to Maintain** tab, this will display the list of parts to check and/or replace during this maintenance:

Materials		Operations		Parts to Service	
Part Number		Part			
T1	▼	Transmission			
R1	▼	Rear Differential			

To add a new part to the list, click on the **New** button. Then select the number of the part (how it is referred to in inventory) from the drop-down menu in the **Part Number** column. The name of the part will automatically display to the right in the **Part** column. To delete a part from the list, select it by clicking on it and then clicking on the **Delete** button.

At the bottom of the window, there are four buttons:

- **OK:** Click **OK** to save your changes and return to the **Vehicle Service Profile Details** window.
- **Delete:** Clicking on the **Delete** button will delete the service you are currently entering or editing.
- **Cancel:** Clicking on the **Cancel** button exits back to the **Vehicle Service Profile Details** window without saving your changes.

Entering Vehicles & Usage Logs

After pressing the **Vehicles to Service** button on the main menu of EZ Maintenance, you will be taken to the **List of Vehicles to Service** window:

List of Vehicles to Service

Vehicle Class Filter: Leave Blank To View all Classes

Vehicle #	Vehicle	License Plate	Lic. Expiration	Customer
100	van	4ut098	12/20/04	2
200	light truck	30vn34	05/12/05	
300	passenger car	34vn679	12/12/04	3
201	light truck	91543ta	10/14/05	
202	light truck	2tup798	04/26/05	

Reset Consumption Flag

Locate By:

Vehicle No.

License Plate

VEHICLE INFORMATION

Vehicle: <input type="text" value="van"/>	Vehicle Number: <input type="text" value="100"/>	SERVICE Start Date: <input type="text" value="12/14/2004"/> Starting Mileage: <input type="text" value="0"/>
Vehicle Class: <input type="text" value="Wiltshire Office"/>	VIN: <input type="text" value="15jy7rt4f"/>	
Make: <input type="text" value="Ford"/>	Registered To: <input type="text" value="Sim's Limo"/>	<input type="button" value="Usage Log"/> <input type="button" value="Print Log"/> <input type="button" value="Print Vehicle Information"/>
Year Built: <input type="text" value="2000"/>	License Plate: <input type="text" value="4ut098"/>	
No. of Passenger Seats: <input type="text" value="6"/>	License Expiration Date: <input type="text" value="12/20/2004"/>	
Transmission: <input type="text" value="Auto"/>	State Where Registered: <input type="text" value="CA - California"/>	
Customer: <input type="text"/>		
Comments: <input type="text"/>		

Here you can see all of the vehicles for which you currently using EZ Maintenance to track and control maintenance. There is a list at the top of the window that shows each vehicle:

Vehicle #	Vehicle	License Plate	Lic. Expiration	Customer
100	van	4utt098	12/20/04	2
200	light truck	90yut34	05/12/05	
300	passenger car	84pr673	12/12/04	3
201	light truck	8t543ta	10/14/05	
202	light truck	2tup798	04/26/05	

For each vehicle listed you can see the vehicle number which you use to keep track of it in EZ Maintenance (**Vehicle #**), the type of vehicle it is (**Vehicle**), the license plate number of the vehicle (**License Plate**), the expiration date of the license (**Lic. Expiration**), and—if you are maintaining the vehicle for a customer—the ID # of the customer for whom you are maintaining the vehicle (**Customer**).

When you select a vehicle from the list by clicking on it, the information within the **Vehicle Information** portion of the window will be filled in. This part of the window contains many data items about the vehicle you have selected:

VEHICLE INFORMATION			
Vehicle :	passenger car	Vehicle Number :	300
Vehicle Class :	El Segundo	VIN :	458typu746r
Make :	Honda	Registered To :	Kane Confections
Year Built :	2002	License Plate :	84pr673
No. of Passenger Seats :	3	License Expiration Date :	12/12/2004
Transmission :	Manual	State Where Registered :	CA - California
Comments :	Delivery vehicle.		Customer : Kane Confections
			SERVICE
			Start Date
			12/14/2004
			Starting Mileage
			20000

Vehicle: This is the vehicle name (i.e. what type of vehicle it is) of the vehicle you have currently selected.

Vehicle Class: This is the classification with which you have chosen to label the vehicle you have selected.

Make: The make of the vehicle which you have selected.

Year Built: The year in which the vehicle you have selected was built.

No. of Passenger Seats: This is the number of passenger seats in the vehicle you've selected.

Transmission: This is the type of transmission which the vehicle you selected has.

Vehicle #: This is the vehicle number of the vehicle you selected which you use to track it in EZ Maintenance.

VIN: This is the VIN (vehicle identification number) of the vehicle which you have selected.

Registered To: The person or business to which the vehicle which you have selected is registered.

License Plate: This is the license plate number of the vehicle which you have selected.

License Expiration Date: This is the expiration date of the license or registration of the vehicle which you have selected.

State Where Registered: This is the state in which the vehicle you have selected is registered.

Customer: This is the ID number of the customer for whom you are servicing the vehicle which you selected.

Comments: Here are any comments entered about the vehicle you have selected.

There are also a couple of search features in the **List of Vehicles to Service** window which can help you locate a specific vehicle or group of vehicles in EZ Maintenance. The first is the **Vehicle Class Filter** drop-down box at the very top of the window:



This drop-down box allows you to list all of the vehicles and only those vehicles that belong to a certain classification you selected. To do this, click on the arrow on the right side of the drop-down box to expand the list, and then click on the name of the classification you wish. Notice that the list of vehicles will be updated with all of the vehicles and only those vehicles which belong to the classification you selected. If you want to view all of the vehicles you have entered into EZ Maintenance without regards to classification (which is the default), then select “None” from the drop-down list.

The second search feature on the **List of Vehicles to Service** window allows you to search for a specific vehicle if you know its license plate number or its vehicle number (to clarify, this is not the VIN, but rather the number you use to track this vehicle internally in EZ Maintenance.):

In the box containing this search feature, you’ll see two circles called **Vehicle No.** and **License Plate**, either of which you click if you want to search by vehicle number or license plate respectively. After you’ve chosen whether you want to search by vehicle number or license plate number, then click in the box below and type the vehicle number or license plate number (depending on what you chose) of the vehicle which you want to locate in EZ Maintenance. Then click on the **Locate** button; if a vehicle that matches what you typed exists in the system, it will be selected in the list.



On the right side of the window there are three buttons, **Usage Log**, **Print Log**, and **Print Vehicle Information**:

- **Usage Log:** Clicking on the **Usage Log** button will allow you to enter mileage and fuel usage logs for vehicles that you’ve entered into EZ Maintenance. Entering usage logs will be explained in depth further down in this section (see the sub topic “Entering and Printing Usage Logs”).
- **Print Log:** Clicking on the **Print Log** button lets you print a record of the usage logs entered for a selected vehicle within a certain date range, or the amount of usage logged within each state that the vehicle was operated in. Printing usage logs will be explained in more detail further down in this section (see the sub topic “Entering and Printing Usage Logs”).
- **Print Vehicle Information:** The **Print Vehicle Information** button lets you print an information sheet for a selected vehicle. Click on a vehicle from the list to select it, and then click on the **Print Vehicle Information** button to print the report.

At the bottom of the window are four more buttons:

- **New:** Clicking on the **New** button allows you to enter a new vehicle into EZ Maintenance. Entering new vehicles into the program will be explained in depth further down in this section (see the sub topic “Entering Vehicles into EZ Maintenance”).
- **Delete:** The **Delete** button allows you to delete a vehicle from EZ Maintenance. To delete a vehicle, first select it from the list by clicking on it and then click on the **Delete** window. A small window with a prompt will ask you to confirm whether or not you want to delete the vehicle; click on the **Yes** button to delete the vehicle, or click **No** if you have changed your mind and do not want to delete it.
- **Edit:** The **Edit** button allows you to change the information for an existing vehicle in EZ Maintenance. To do this, first select a vehicle from the list by clicking on it, then click on the **Edit** button. Editing vehicles will be explained in depth further down in this section (see the sub topic “Editing an Existing Vehicle”).

- **OK:** Clicking on the **OK** button will exit you from the **List of Vehicles to Service** window and back to the EZ Maintenance main menu.

Entering Vehicles into EZ Maintenance

As described above, to enter a new vehicle into EZ Maintenance, click on the **New** button at the **List of Vehicles to Service** window. This will open the **Vehicle Information** window where you will enter various pieces of information about the vehicle you are entering as well as what kind of maintenance is required for it:

The screenshot shows the 'Service Requirements' window with the 'VEHICLE INFORMATION' section. The form is divided into several sections:

- Customer:** A dropdown menu.
- Vehicle:** A dropdown menu.
- Vehicle Class:** A dropdown menu.
- Make:** A text input field.
- Year Built:** A text input field.
- No. of Passenger Seats:** A text input field.
- Transmission:** A text input field.
- Comments:** A text area.
- Vehicle Number:** A text input field.
- VIN:** A text input field.
- Registered To:** A text input field.
- License Plate:** A text input field.
- License Expiration Date:** A date picker.
- State Where Registered:** A dropdown menu.
- Set Advance Notice Flag for Usage at:** A text input field.
- Service Start Date:** A date picker.
- Starting Usage Meter:** A text input field.
- Usage Units:** A text input field.
- Fuel Units:** A text input field.
- Min. Fuel Efficiency:** A text input field.
- Color:** A text input field.
- Collision cover:** A text input field.
- Engine Size:** A text input field.
- Diesel or Gas:** A text input field.
- Customize Captions:** A button.

Below the vehicle information section, there is a 'Profile:' dropdown menu, a 'Service Comments:' text area, and a table titled 'SERVICE REQUIREMENTS' with columns for 'Type', 'No Of Months', and 'Usage'. At the bottom of the window are buttons for 'OK', 'Reproduce', 'Print', and 'Cancel'.

You will notice that there are many different fields in the upper left hand corner into which you can enter information about the new vehicle:

The screenshot shows the 'Service Requirements' window with the 'VEHICLE INFORMATION' section filled with data:

- Customer:** 2
- Vehicle:** light truck
- Vehicle Class:** LA Warehouse
- Make:** Toyota
- Year Built:** 2001
- No. of Passenger Seats:** 1
- Transmission:** Automatic
- Comments:** Delivery truck.
- Vehicle Number:** 203
- VIN:** 18trf490ur
- Registered To:** Link It Software
- License Plate:** 90yux34
- License Expiration Date:** 05/12/2005
- State Where Registered:** CA - Ca
- Set Advance Notice Flag for Usage at:** 100

The table below summarizes the meaning of each of these data items:

Customer: This is the ID number of the customer for whom you are servicing the vehicle which you selected.

Vehicle: This is the vehicle name (i.e. what type of vehicle it is) of the vehicle you have currently selected.

Vehicle Class: This is the classification with which you have chosen to label the vehicle you have selected.

Make: The make of the vehicle which you have selected.

Year Built: The year in which the vehicle you have selected was built.

No. of Passenger Seats: This is the number of passenger seats in the vehicle you've selected.

Transmission: This is the type of transmission which the vehicle you selected has.

Comments: Here are any comments entered about the vehicle you have selected.

Vehicle #: This is the vehicle number of the vehicle you selected which you use to track it in EZ Maintenance.

VIN: This is the VIN (vehicle identification number) of the vehicle which you have selected.

Registered To: The person or business to which the vehicle which you have selected is registered.

License Plate: This is the license plate number of the vehicle which you have selected.

License Expiration Date: This is the expiration date of the license or registration of the vehicle which you have selected.

State Where Registered: This is the state in which the vehicle you have selected is registered.

Set Advance Notice Flag for Usage at: This is where you enter the number of days you want to be notified in advance of your vehicle license expiring.

To enter information in all these fields except for **Vehicle**, **Vehicle Class**, and **State Where Registered**, just click in the field with your mouse and type your entry. To choose the **Vehicle**, **Vehicle Class** and **State Where Registered**, click on the arrow next to each box to expand each list and then choose your entry from each.

There are four other fields to the right of the fields we just mentioned:

- **Service Start Date:** This is the field where you enter the date from which you want maintenance to begin being scheduled. Click on the box and type in the start date of maintenance.
- **Starting Usage Meter:** is used when you want to have the vehicle's usage meter start with a value greater than zero. Click on the box and type in a positive integer value (i.e. 20, 156, 25000).
- **Usage Units:** This is the unit in which you are measuring usage. With vehicles, examples of typical entries in this field would be "miles" or "kilometers". Click in the box and type the unit in which you want to measure usage.
- **Fuel Units:** This is the unit in which you are measure fuel usage. Examples of typical entries in this field would be "gallon" or "litre". Click in the box and type the unit in which you want to measure fuel.
- **Min. Fuel Efficiency:** This is the minimum fuel efficiency for the vehicle which you are entering into EZ Maintenance. Click in the box and type in the minimum amount of usage units you expect to get for each unit of fuel used.

Service Start Date
<input type="text" value="03/07/2007"/>
Starting Usage Meter
<input type="text" value="500"/>
Usage Units
<input type="text" value="miles"/>
Fuel Units
<input type="text" value="gallon"/>
Min. Fuel Efficiency
<input type="text" value="20.00"/>
(miles/gallon)

Notice that after you type in the usage units and the fuel units that a box below the five aforementioned fields will automatically fill in with the correct units for measuring fuel efficiency.

Now to the right there are six fields and below that and a **Customize Captions** button. The six fields have captions that are customizable:

Color
Beige
Collision cover
Yes
Displacement
3.0 L
Diesel or Gas
Gas
Hybrid
No
Radio
Yes
Customize Captions

To change the captions, click on the **Customize Captions** button. This will pop up a window into which you can type the captions which you'd like to appear by the six fields:

Vehicle Custom Captions	
Enter caption for first label :	Color
Enter caption for second label :	Collision cover
Enter caption for third label :	Displacement
Enter caption for fourth label :	Diesel or Gas
Enter caption for fifth label :	Hybrid
Enter caption for sixth label :	Radio
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Click in each field and type the captions you wish to appear by the six fields. When you are finished, click on the **Save** button to save the captions you chose, or click **Cancel** to discard your changes if you've changed your mind. Keep in mind that these customizable fields are not just for one specific vehicle and will display with the captions you chose anytime you are entering a new vehicle or editing one.

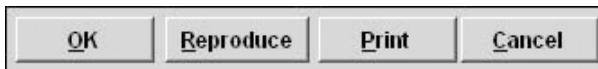
The last piece of information we need to enter into the **Vehicle Information** window is the kind of maintenance which will need to be performed on this vehicle. Notice that at the bottom of the window there is a **Profile** drop-down box, a **Service Comments** box, and a **Service Requirements** list:

Profile: Service Comments:

SERVICE REQUIREMENTS		
Type	No Of Months	Usage
Routine Maintenance	1	5000
Cooling System Maintenance	2	10000
Transmission Maintenance	2	12000
Brake Maintenance	3	15000

To select what kind of maintenance is to be performed on this vehicle, you must select a service profile from the **Profile** drop-down box. Click on the arrow on the right side of the box to expand the list of profiles and then click on the desired profile. Once you've selected a maintenance profile, the **Service Requirements** list will automatically fill in with the list of service types within that maintenance profile, and the **Service Comments** box will fill in with comments or a description of the service profile you chose.

Lastly, at the bottom of the window there are four buttons:



Click on the **OK** button when you are finished entering the information for the new vehicle you want to enter, or click on **Cancel** to discard all information you have entered if you have changed your mind and you do not want to enter the vehicle into EZ Maintenance.

Clicking on the **Print** button prints out a report showing each of the services which the maintenance you chose prescribes, along with the time and usage intervals on which they are scheduled.

The **Reproduce** button represents a very useful feature that allows you to create another vehicle exactly like the one you have entered. When you are finished entering all of the information for the new vehicle and you want to create another vehicle exactly like that one, click on the **Reproduce** button. This will save the information for the new vehicle you are entering and re-open the **Vehicle Information** window with all of the same details as the last vehicle except that the **Customer**, **Vehicle Number**, **VIN**, and **License Plate** fields will be blank as you will have to choose values for that data that is different from the last vehicle.

Editing an Existing Vehicle

You can use the **Edit** button at the **List of Vehicles to Service** window to change the information for a vehicle you currently have entered into EZ Maintenance. Select a vehicle from the list by clicking on it and then click on the **Edit** button. This will open the **Vehicle Information** window.

This window functions similarly to the **Vehicle Information** window which you use to enter a new vehicle (see above "Entering Vehicles into EZ Maintenance"). In this window you can change all of the information you previously entered except for the vehicle number (**Vehicle Number**), the VIN number (**VIN**), the license plate number (**License Plate**), the start date (**Service Start Date**), and the starting usage (**Starting Usage Meter**).

When you are finished making the desired changes, click on the **OK** button to save the changes you made. If you have changed your mind, click on the **Cancel** button to discard any changes you've made.

Entering and Printing Usage Logs

You can use the **Usage Log** button on the **List of Vehicles to Service** window to enter usage logs for your vehicles. To start making log entries, select a vehicle for which you want to make an entry by clicking on it and then click on the **Usage Log** button. This will open the **Vehicle Usage Log** window:

Vehicle Usage Log

Vehicle: 300 License: 84pr673
 Make: Honda Year Built: 2002

Date	Meter	State	Usage	Usage Units	Consumed Fuel	Fuel Units	Fuel Cons	Notes
12/14/04	20000		0	Miles		Gallons	0.00	
03/07/07	25000	CA - California	5000	Miles	250.00	Gallons	20.00	
03/07/07	27500	CA - California	2500	Miles	125.00	Gallons	20.00	
03/07/07	32500	AZ - Arizona	5000	Miles	250.00	Gallons	20.00	
03/07/07	32600	AZ - Arizona	100	Miles	5.00	Gallons	20.00	

New Delete Print Cancel OK

At the top of the window there are four fields which display the vehicle number for the vehicle for which you are entering usage log entries, the make of the vehicle, its license plate number and the year in which it was built. Below that there is a listing of log entries that have been made so far:

Date	Meter	State	Usage	Usage Units	Consumed Fuel	Fuel Units	Fuel Cons	Notes
12/14/04	20000		0	Miles		Gallons	0.00	
03/07/07	25000	CA - California	5000	Miles	250.00	Gallons	20.00	
03/07/07	27500	CA - California	2500	Miles	125.00	Gallons	20.00	
03/07/07	32500	AZ - Arizona	5000	Miles	250.00	Gallons	20.00	
03/07/07	32600	AZ - Arizona	100	Miles	5.00	Gallons	20.00	

Below the list of log entries there are five buttons: **New**, **Delete**, **Print**, **Cancel**, and **OK**. To create a new log entry, click on the **New** button. This will open up a window into which you enter the details of the new log entry:

Log

Vehicle Usage Log

Vehicle Number: 300

Date: 03/07/2007

Last Meter Reading: 32600 Miles Current Meter: 32760 Miles Usage: 160 Miles

State: AZ - Arizona

Fuel Used: 10.00 Gallons Fuel Efficiency: 16.0000

Notes: Note that fuel efficiency below normal levels

Buttons: Cancel, OK

The first field in this window (**Vehicle Number**) displays the vehicle number of the vehicle for which you are making the log entry. The other fields in this window are:

- **Date:** This is where you enter the date of the log entry. Click on the box and type in the desired date in the format mm/dd/yyyy.
- **Last Meter Reading:** This field displays the total number of miles driven that were logged for the vehicle at the time of the last log entry. The number in this field cannot be changed.
- **Current Meter Reading:** This is where you enter the total number of miles which the vehicle has been driven since being entered in EZ Maintenance. Generally speaking, this value will be the same as the current odometer reading on the vehicle. Click on the box and type in the number of miles.
- **Usage:** This displays the number of miles that have been logged for the vehicle since the last log entry. The value in this field is automatically calculated by taking the difference between the value in the **Last Meter Reading** field and the **Current Meter Reading** field, and it cannot be edited.
- **State:** This is where you select the state in which the logged miles were driven. Click on the right side of the box to expand the list of states and then click on the desired state.
- **Fuel Used:** This is where you enter the amount of fuel consumed during the miles that were logged. Click in the box and type a number up to two decimal places.
- **Fuel Efficiency:** This displays the fuel efficiency for the miles logged. This field is automatically calculated by dividing the value in the **Usage** field by the value in the **Fuel Used** field.
- **Notes:** This is where you enter any comments on the log entry. Click in the box and type any comments you wish to add to the entry.

Once you are finished entering all of the information for the log entry, click on the **OK** button at the lower right hand corner of the window to add the log entry. If you have changed your mind and do not want to add the log entry, click on the **Cancel** button to discard any entries you have made and abort adding the log entry.

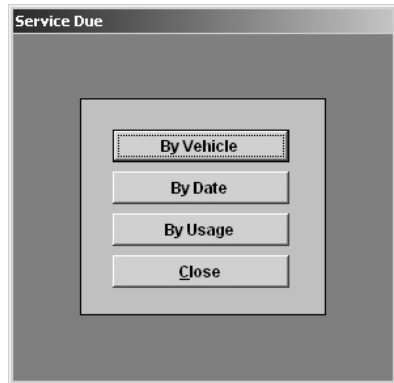
Service Due

The Service Due section of EZ Maintenance is where you can see upcoming maintenance events and work orders as well as create new work orders. To go to this section of the program, click on the **Service Due**

button under **Vehicle Service** on the EZ Maintenance main menu. This will open up a small window with three buttons including a **Close** button, clicking on which will bring you back to the EZ Maintenance main menu:

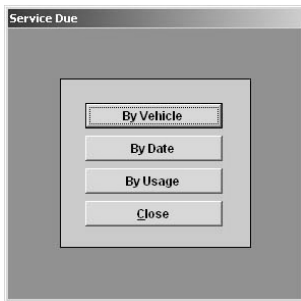
The other three buttons enable you to view what maintenance is due in three different ways:

- **By Vehicle:** Clicking on the **By Vehicle** button takes you to a section of the program where you can view maintenance due where all maintenance events are grouped together based on what piece of vehicle they are for. See further down for the sub topic “Viewing Service Due by Vehicle” for in-depth information.
- **By Date:** Clicking on the **By Date** button takes you to a section of the program where you can view all maintenance events for all vehicles organized in chronological fashion. See further down for the sub topic “Viewing Service Due by Date” for in-depth information.
- **By Usage:** Clicking on the **By Usage** button takes you to a section of the program where you can view all maintenance events for all vehicle sorted in order of how close each maintenance event is to being due based on the amount of usage units logged for the vehicle. See further down for the sub topic “Viewing Service Due by Usage” for in-depth information.



Viewing Service Due by Vehicle

One way of viewing upcoming and due vehicle maintenance events is “by vehicle”. To view maintenance due by vehicle, first click on the **Service Due** button on the EZ Maintenance main menu. This will open up a small window with three buttons plus a **Close** button:



Click on the **By Vehicle** button to view maintenance due by vehicle. This will open up the **Service Due by Vehicle** window:

Service Due By Vehicle

WORK ORDERS

Locate by:

Vehicle No.

Work Order No.

Locate

Click column heading to sort

Vehicle No.	Vehicle Name	VIN	Vehicle Class
100	van	15jy7rt4f	Wilshire Office
200	light truck	18trf490ur	LA Warehouse
201	light truck	23rju984j1lw	Wilshire Office
202	light truck	85r4ty67ikm	Wilshire Office
300	passenger car	458typu746r	El Segundo

Reports

Full Report

Custom Report:

Serv. Summary

Parts to Service

Materials

Operations

Print Selected

Select All
Unselect All

Work Order No.	To Print	Assigned To	Type	Frequency (Months)	Next Due	Frequency (Usage)	Miles Till Next Service
	<input type="checkbox"/>		Routine Maintenance	3	03/20/05	3000	3000
	<input type="checkbox"/>		Routine Maintenance	3	03/20/05	3000	3000
5	<input type="checkbox"/>		Cooling System Maintenance	10	10/10/05	10000	-10000
6	<input type="checkbox"/>		Transmission Maintenance	12	12/09/05	12000	-8000
	<input type="checkbox"/>		Brake Maintenance	18	06/07/06	17000	-3000

New Unscheduled Work Order
Create/Edit Work Order
Assign Work Orders
Print List
Calendar
Close

Firstly, notice that all of the vehicles you have currently have entered into EZ Maintenance are listed in the center of the window:

Vehicle No.	Vehicle Name	VIN	Vehicle Class
100	van	15jy7rt4f	Wilshire Office
200	light truck	18trf490ur	LA Warehouse
201	light truck	23rju984j1lw	Wilshire Office
202	light truck	85r4ty67ikm	Wilshire Office
300	passenger car	458typu746r	El Segundo

When you select one of the vehicles from the list in the middle of the window by clicking on it, the list at the bottom of the window will be updated with the upcoming or due maintenance events for that vehicle:

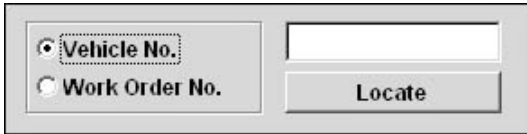
For each vehicle service event, the following data items are shown (going from left to right):

- **Work Order No.:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** If a work order has been created and it has been assigned to an employee, the name of the employee is displayed here.
- **Type:** What kind of maintenance this scheduled event is (i.e. service type).
- **Frequency (Months):** How frequently this maintenance occurs (in number of months).
- **Next Due:** When this maintenance is due to be performed. If the scheduled maintenance goes beyond the due date, the due date shown here will be shown in **red text**.
- **Frequency (Usage):** How frequently this maintenance occurs (in number of usage units logged, such as miles).
- **Miles Until Next Service.:** The number of usage units (such as miles) that must be logged for this vehicle until it is due for its next maintenance.

Also notice that between the **Work Order No.** column and the **Assigned To** column there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for

scheduled maintenance events, the corresponding checkbox for that event must be checked. Printing work orders is discussed further down in this section.

Above the list of vehicles there is a search box which you can use to either to locate a particular vehicle in EZ Maintenance if you know its vehicle number, or you can locate a work order if you know the work order number:

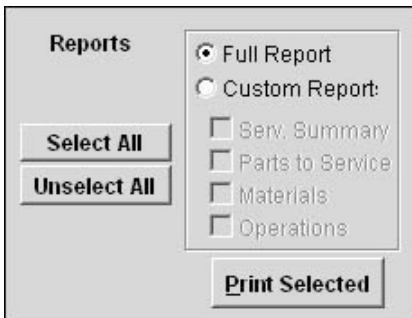


The image shows a search interface with two radio buttons on the left. The top radio button is selected and labeled "Vehicle No.". Below it is another radio button labeled "Work Order No.". To the right of the radio buttons is a text input box. Below the input box is a button labeled "Locate".

To search for a particular vehicle, first click on the circle called **Vehicle No.**. Then click on the box to the right and type the vehicle number of the vehicle which you want to locate, and then click on the **Locate** button. If a vehicle with the vehicle number which you typed exists in EZ Maintenance, it will be selected from the list.

To locate a work order, first click on the circle called **Work Order No.**. Then click on the box to the right and type the number of the work order which you want to locate, and then click on the **Locate** button. If there is a work order for a maintenance event which has the number that you typed, it will be selected in the list of maintenance events.

At the upper right hand corner of the window is a box where you can print the work orders which you have selected:



The image shows a "Reports" section with two buttons on the left: "Select All" and "Unselect All". To the right is a list of report options. The "Full Report" option is selected with a radio button. Below it are four checkboxes: "Serv. Summary", "Parts to Service", "Materials", and "Operations". At the bottom right of the section is a button labeled "Print Selected".

When you print work orders here, you can choose to print either a full work order or a simpler one that contains only the items you want to include. Notice that there are two circles called **Full Report** and **Custom Report**. To print a full work order for all checked work orders, click on the **Full Report** circle and then click on the **Print Selected** button.

To print a custom work order containing only the items you want to include, first click on the **Custom Report** circle. Then, from the four checkboxes below **Custom Report**, check (by clicking with your mouse) the items which you want to include on the work order: the services included in the work order (**Serv. Summary**), the parts in the work order (**Parts to Service**), the materials in the work order (**Materials**), or the operations needed to perform each service (**Operations**). Once you have selected the items you wish to appear on the printed work order, click on the **Print Selected** button to print all checked work orders.

You can also click on the **Select All** or **Unselect All** buttons to check all work orders or ensure that all work orders are unchecked, respectively.

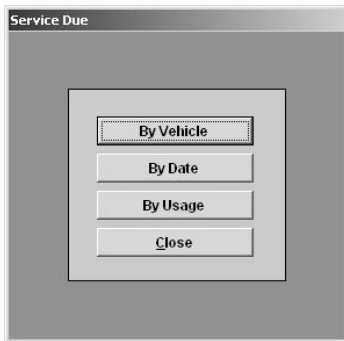
Lastly, at the bottom of the **Service Due by Vehicle** window, there are five buttons (plus a **Close** button that allows you to exit from this section of EZ Maintenance) corresponding with other tasks you can perform here:

- **New Unscheduled Work Order:** Click on the **New Unscheduled Work Order** button to create an unscheduled work order.
- **Create/Edit Work Order:** Select a maintenance event by clicking on it with your mouse and then click on the **Create/Edit Work Order** button to create a work order for that maintenance event. The **Create/Edit Work Order** button also allows you to edit work orders that are currently open. To do this, select a maintenance event from the list by clicking on it and then click on the **Create/Edit Work Order** button.
- **Assign Work Orders:** Click on the **Assign Work Orders** button to open up a window where you can see all scheduled maintenance events and easily assign them to personnel.
- **Print List:** Click on the **Print List** button to print a list of all upcoming maintenance events.
- **Calendar:** Click on the **Calendar** button to open up a window containing a calendar which lets you view the maintenance events due on any given day or during a specified date range.

When you are finished and wish to exit from the **Service Due by Vehicle** window, click on the **Close** button.

Viewing Service Due by Date

One way of viewing upcoming and due vehicle maintenance events is “by date”. To view maintenance due by date, first click on the **Service Due** button on the EZ Maintenance main menu. This will open up a small window with three buttons plus a **Close** button:



Click on the **By Date** button to view maintenance due by date. This will open up the **Service Due by Date** window:

Service due By Date

WORK ORDERS

Locate by:

Vehicle No.
 Work Order No.

Reports

Full Report
 Custom Report:
 Selv. Summary
 Parts to Service
 Materials
 Operations

Click column heading to sort

Next Due	Work Order No.	To Print	Assigned To	Vehicle Number	Vehicle	Type	Frequency (Months)
03/14/05		<input type="checkbox"/>		201	light truck	Brake Maintenance	3
03/14/05		<input type="checkbox"/>		202	light truck	Brake Maintenance	3
03/14/05		<input type="checkbox"/>		200	light truck	Brake Maintenance	3
03/20/05	7	<input type="checkbox"/>		100	van	Routine Maintenance	3
03/20/05		<input type="checkbox"/>		100	van	Routine Maintenance	3
06/18/05	8	<input type="checkbox"/>		300	passenger car	Cooling System Maintenance	6
10/10/05	5	<input type="checkbox"/>		100	van	Cooling System Maintenance	10
12/09/05	6	<input type="checkbox"/>		100	van	Transmission Maintenance	12
12/09/05		<input type="checkbox"/>		300	passenger car	Transmission Maintenance	12
06/07/06		<input type="checkbox"/>		100	van	Brake Maintenance	18
11/29/07		<input type="checkbox"/>		300	passenger car	Hydraulics Maintenance	36

Notice that in the middle of the window is a list of all upcoming and due maintenance events for all vehicles you have entered in the program:

Next Due	Work Order No.	To Print	Assigned To	Vehicle Number	Vehicle	Type	Frequency (Months)
03/14/05		<input type="checkbox"/>		201	light truck	Brake Maintenance	3
03/14/05		<input type="checkbox"/>		202	light truck	Brake Maintenance	3
03/14/05		<input type="checkbox"/>		200	light truck	Brake Maintenance	3
03/20/05	7	<input type="checkbox"/>		100	van	Routine Maintenance	3
03/20/05		<input type="checkbox"/>		100	van	Routine Maintenance	3
06/18/05	8	<input type="checkbox"/>		300	passenger car	Cooling System Maintenance	6
10/10/05	5	<input type="checkbox"/>		100	van	Cooling System Maintenance	10
12/09/05	6	<input type="checkbox"/>		100	van	Transmission Maintenance	12
12/09/05		<input type="checkbox"/>		300	passenger car	Transmission Maintenance	12
06/07/06		<input type="checkbox"/>		100	van	Brake Maintenance	18
11/29/07		<input type="checkbox"/>		300	passenger car	Hydraulics Maintenance	36

For each maintenance event, the following data items are shown (going from left to right):

- **Next Due Date:** When this maintenance is due to be performed. If the scheduled maintenance goes beyond the due date, the due date shown here will be shown in red text.
- **W.O. No.:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** If a work order has been created and it has been assigned to an employee, the name of the employee is displayed here.
- **Vehicle Number:** This is the internal identifying number for the vehicle for which this maintenance event is scheduled.
- **Vehicle.:** This is the vehicle name (i.e. type of vehicle) of the vehicle for which this maintenance event is scheduled.
- **Type:** What kind of maintenance this scheduled event is.
- **Frequency (Months):** How frequently this maintenance occurs (in number of months).

Also notice that between the **Work Order No.** column and the **Assigned To** column there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for

scheduled maintenance events, the corresponding checkbox for that event must be checked. Printing work orders is discussed further down in this section.

Above the list of vehicles there is a search box which you can use to either to locate the maintenance events for a particular vehicle in EZ Maintenance if you know its vehicle number, or you can locate a work order if you know the work order number:

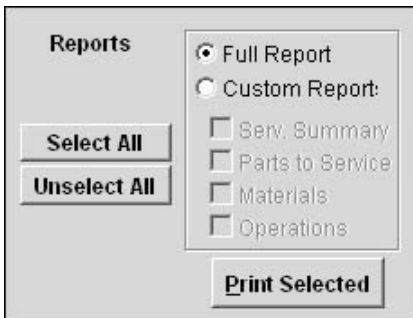


The image shows a search interface with two radio buttons on the left: "Vehicle No." (selected) and "Work Order No.". To the right is a text input box. Below the input box are two buttons: "Locate" and "Locate Next".

To search for the maintenance events for a particular vehicle, first click on the circle called **Vehicle No.**. Then click on the box to the right and type the vehicle number of the vehicle which you want to locate, and then click on the **Locate** button. If a vehicle with the vehicle number which you typed exists in EZ Maintenance, the first maintenance event listed will be selected. Now, if you click the **Locate Next** button, the next maintenance event that listed for that vehicle will be selected. You can repeatedly use the **Locate Next** button in this fashion to scroll through all of the maintenance events for a particular vehicle.

To locate a work order, first click on the circle called **Work Order No.**. Then click on the box to the right and type the number of the work order which you want to locate, and then click on the **Locate** button. If there is a work order for a maintenance event which has the number that you typed, it will be selected in the list of maintenance events.

At the upper right hand corner of the window is a box where you can print the work orders which you have selected:



The image shows a "Reports" dialog box. On the left are two buttons: "Select All" and "Unselect All". On the right, there are two radio buttons: "Full Report" (selected) and "Custom Report:". Below "Custom Report:" are four checkboxes: "Serv. Summary", "Parts to Service", "Materials", and "Operations". At the bottom right is a "Print Selected" button.

When you print work orders here, you can choose to print either a full work order or a simpler one that contains only the items you want to include. Notice that there are two circles called **Full Report** and **Custom Report**. To print a full work order for all checked work orders, click on the **Full Report** circle and then click on the **Print Selected** button.

To print a custom work order containing only the items you want to include, first click on the **Custom Report** circle. Then, from the four checkboxes below **Custom Report**, check (by clicking with your mouse) the items which you want to include on the work order: the services included in the work order (**Serv. Summary**), the parts in the work order (**Parts to Service**), the materials in the work order (**Materials**), or the operations needed to perform each service (**Operations**). Once you have selected the

items you wish to appear on the printed work order, click on the **Print Selected** button to print all checked work orders.

You can also click on the **Select All** or **Unselect All** buttons to check all work orders or ensure that all work orders are unchecked, respectively.

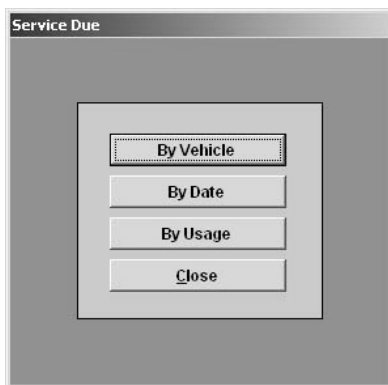
Lastly, at the bottom of the **Service Due by Vehicle** window, there are five buttons (plus a **Close** button that allows you to exit from this section of EZ Maintenance) corresponding with other tasks you can perform here:

- **New Unscheduled Work Order:** Click on the **New Unscheduled Work Order** button to create an unscheduled work order.
- **Create/Edit Work Order:** Select a maintenance event by clicking on it with your mouse and then click on the **Create/Edit Work Order** button to create a work order for that maintenance event. The **Create/Edit Work Order** button also allows you to edit work orders that are currently open. To do this, select a maintenance event from the list by clicking on it and then click on the **Create/Edit Work Order** button.
- **Assign Work Orders:** Click on the **Assign Work Orders** button to open up a window where you can see all scheduled maintenance events and easily assign them to personnel.
- **Print List:** Click on the **Print List** button to print a list of all upcoming maintenance events.
- **Calendar:** Click on the **Calendar** button to open up a window containing a calendar which lets you view the maintenance events due on any given day or during a specified date range.

When you are finished and wish to exit from the **Service Due by Vehicle** window, click on the **Close** button.

Viewing Service Due by Usage

One way of viewing upcoming and due vehicle maintenance events is “by usage”. To view maintenance due by usage, first click on the **Service Due** button on the EZ Maintenance main menu. This will open up a small window with three buttons plus a **Close** button:



Click on the **By Usage** button to view maintenance due by usage. This will open up the **Service Due by Usage** window:

Service due By Usage

WORK ORDERS

Locate by:

Vehicle No.
 Work Order No.

Reports

Full Report
 Custom Report:
 Serv. Summary
 Parts to Service
 Materials
 Operations

Select All
 Unselect All

Click column heading to sort

Miles left	Work Order No.	To Print	Assigned To	Vehicle Number	Vehicle	Type	Frequency (Usage)
-10000	5	<input type="checkbox"/>		100	van	Cooling System Maintenance	10000
-8000	6	<input type="checkbox"/>		100	van	Transmission Maintenance	12000
-3000		<input type="checkbox"/>		100	van	Brake Maintenance	17000
3000	7	<input type="checkbox"/>		100	van	Routine Maintenance	3000
3000		<input type="checkbox"/>		100	van	Routine Maintenance	3000
4000		<input type="checkbox"/>		300	passenger car	Transmission Maintenance	12000
4950		<input type="checkbox"/>		201	light truck	Routine Maintenance	5000
5000		<input type="checkbox"/>		202	light truck	Routine Maintenance	5000
5000		<input type="checkbox"/>		200	light truck	Routine Maintenance	5000
5000		<input type="checkbox"/>		200	light truck	Cooling System Maintenance	10000
6000	8	<input type="checkbox"/>		300	passenger car	Cooling System Maintenance	6000

Notice that in the middle of the window is a list of all upcoming and due maintenance events for all vehicles you have entered in the program:

Miles left	Work Order No.	To Print	Assigned To	Vehicle Number	Vehicle	Type	Frequency (Usage)
-10000	5	<input type="checkbox"/>		100	van	Cooling System Maintenance	10000
-8000	6	<input type="checkbox"/>		100	van	Transmission Maintenance	12000
-3000		<input type="checkbox"/>		100	van	Brake Maintenance	17000
3000	7	<input type="checkbox"/>		100	van	Routine Maintenance	3000
3000		<input type="checkbox"/>		100	van	Routine Maintenance	3000
4000		<input type="checkbox"/>		300	passenger car	Transmission Maintenance	12000
4950		<input type="checkbox"/>		201	light truck	Routine Maintenance	5000
5000		<input type="checkbox"/>		202	light truck	Routine Maintenance	5000
5000		<input type="checkbox"/>		200	light truck	Routine Maintenance	5000
5000		<input type="checkbox"/>		200	light truck	Cooling System Maintenance	10000
6000	8	<input type="checkbox"/>		300	passenger car	Cooling System Maintenance	6000

For each maintenance event, the following data items are shown (going from left to right):

- **Miles Left:** This is the amount of usage units (such as miles) that need to be logged until the vehicle is due for maintenance. If the amount logged goes beyond the point at which the vehicle is scheduled for maintenance, this number will be displayed as a negative number in red text showing the number of usage units that have been logged since the piece of vehicle became due for maintenance.
- **W.O. No.:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** If a work order has been created and it has been assigned to an employee, the name of the employee is displayed here.
- **Vehicle Number:** This is the internal identifying number for the vehicle for which this maintenance event is scheduled.
- **Vehicle.:** This is the vehicle name (i.e. type of vehicle) of the vehicle for which this maintenance event is scheduled.
- **Type:** What kind of maintenance this scheduled event is.
- **Frequency (Months):** How frequently this maintenance occurs (in number of months).

By default, the list of maintenance events is sorted by **Miles Left** in descending order. However, you can sort the list by any of the data items mentioned above by clicking on the column headers.

Also notice that between the **Work Order No.** column and the **Assigned To** column there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for scheduled maintenance events, the corresponding checkbox for that event must be checked. Printing work orders is discussed further down in this section.

Above the list of maintenance events there is a search box which you can use to either to locate the maintenance events for a particular vehicle in EZ Maintenance if you know its vehicle number, or you can locate a work order if you know the work order number:

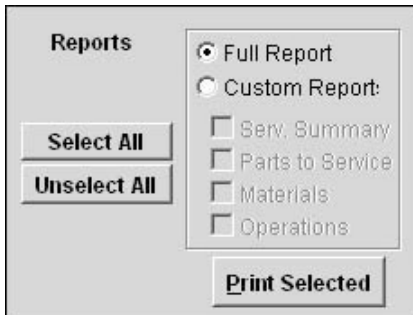


The image shows a search interface with two radio buttons on the left: **Vehicle No.** (selected) and **Work Order No.**. To the right is a text input field. Below the input field are two buttons: **Locate** and **Locate Next**.

To search for the maintenance events for a particular vehicle, first click on the circle called **Vehicle No.**. Then click on the box to the right and type the vehicle number of the vehicle which you want to locate, and then click on the **Locate** button. If a vehicle with the vehicle number which you typed exists in EZ Maintenance, the first maintenance event listed will be selected. Now, if you click the **Locate Next** button, the next maintenance event that listed for that vehicle will be selected. You can repeatedly use the **Locate Next** button in this fashion to scroll through all of the maintenance events for a particular vehicle.

To locate a work order, first click on the circle called **Work Order No.**. Then click on the box to the right and type the number of the work order which you want to locate, and then click on the **Locate** button. If there is a work order for a maintenance event which has the number that you typed, it will be selected in the list of maintenance events.

At the upper right hand corner of the window is a box where you can print the work orders which you have selected:



The image shows a 'Reports' section with two buttons: **Select All** and **Unselect All**. To the right are two radio buttons: **Full Report** (selected) and **Custom Report:**. Under **Custom Report:** are four checkboxes: **Serv. Summary**, **Parts to Service**, **Materials**, and **Operations**. At the bottom is a **Print Selected** button.

When you print work orders here, you can choose to print either a full work order or a simpler one that contains only the items you want to include. Notice that there are two circles called **Full Report** and **Custom Report**. To print a full work order for all checked work orders, click on the **Full Report** circle and then click on the **Print Selected** button.

To print a custom work order containing only the items you want to include, first click on the **Custom Report** circle. Then, from the four checkboxes below **Custom Report**, check (by clicking with your mouse) the items which you want to include on the work order: the services included in the work order (**Serv. Summary**), the parts in the work order (**Parts to Service**), the materials in the work order (**Materials**), or the operations needed to perform each service (**Operations**). Once you have selected the items you wish to appear on the printed work order, click on the **Print Selected** button to print all checked work orders.

You can also click on the **Select All** or **Unselect All** buttons to check all work orders or ensure that all work orders are unchecked, respectively.

Lastly, at the bottom of the **Service Due by Usage** window, there are five buttons (plus a **Close** button that allows you to exit from this section of EZ Maintenance) corresponding with other tasks you can perform here:

- **New Unscheduled Work Order:** Click on the **New Unscheduled Work Order** button to create an unscheduled work order.
- **Create/Edit Work Order:** Select a maintenance event by clicking on it with your mouse and then click on the **Create/Edit Work Order** button to create a work order for that maintenance event. The **Create/Edit Work Order** button also allows you to edit work orders that are currently open. To do this, select a maintenance event from the list by clicking on it and then click on the **Create/Edit Work Order** button.
- **Assign Work Orders:** Click on the **Assign Work Orders** button to open up a window where you can see all scheduled maintenance events and easily assign them to personnel.
- **Print List:** Click on the **Print List** button to print a list of all upcoming maintenance events.
- **Calendar:** Click on the **Calendar** button to open up a window containing a calendar which lets you view the maintenance events due on any given day or during a specified date range.

When you are finished and wish to exit from the **Service Due by Usage** window, click on the **Close** button.

Vehicle Work Orders

Two types of vehicle work orders can be opened in EZ Maintenance:

1. Routine or “Scheduled” work orders: these are work orders for preventive maintenance that occurs on a periodic basis.
2. Non-routine emergency or “Unscheduled” work orders: these are work orders that are created for unexpected reasons like sudden vehicle breakdowns. Unscheduled work orders are not scheduled but rather created as the need arises.

In this topic, both scheduled and unscheduled vehicle work orders are discussed as well as a special feature you can use to easily and quickly assign work orders (see the subtopic “Assign Work Orders” below) and a maintenance calendar you can use to see what maintenance is due on any given day (see the topic “Maintenance Calendar” below)

Scheduled Vehicle Work Orders

This section discusses how to open a scheduled vehicle work order, how to close a scheduled work order, and how to change the materials, replacement parts, and operations prescribed in the work order.

Opening a Scheduled Work Order

To open a new scheduled work order, you must select a vehicle and use the **Create / Edit Work Order** button when viewing service either by vehicle, by date, or by usage (see the topic further up in this chapter called “Service Due” for more information on how to do this). This will take you to the work order window:

Scheduled Service - Work Order

No: Date:

Vehicle: Make: Vehicle Reference Notes:

Vehicle No.: Year Built:

License Plate: Transmission: Log Odometer Reading:

VIN:

Notes: Oil service only

Exceptions: Modifications to the stand

	Scheduled	Actual
Completion Date:	01/13/2005	03/08/2007
Days since last service:	30	0
Odometer:	37000	40120
Miles since last service:	5000	8120

Next Due Date:

Total Labor Hours: Vehicle Down Time(hrs):

Labor Average Cost: Total Materials Cost:

Service Profile: Service Type:

List of Services: Oil and filter change

Checklist of Onboard Supplies: Transmission check, fluid change

Print Selected

At the top right corner of the window you will see two fields called **No.** and **Date** that display, respectively, the number that this work order has been assigned and the date on which the work order was created:

No: Date:

Work order numbers are integers and are automatically assigned to work orders by EZ Maintenance in sequential order starting with the number 1. As such, the first work order created would be work order #1, the second would be #2, the third would be #3, and so on and so forth.

Immediately below the work order number field, you’ll see two tabs called **Vehicle** and **Customer**. Clicking on the **Vehicle** tab displays some data fields that give information about the vehicle for which you are creating the work order:

Vehicle: Make: Vehicle Reference Notes:

Vehicle No.: Year Built:

License Plate: Transmission: Log Odometer Reading:

VIN:

- **Vehicle:** This is the vehicle name (i.e. what type of vehicle it is) of the vehicle for which you are creating the work order.

- **Vehicle #:** This is the vehicle number of the vehicle for which you are creating the work order which you use to track it in EZ Maintenance.
- **License Plate:** This is the license plate number of the vehicle for which you are creating the work order.
- **VIN:** This is the VIN (vehicle identification number) of the vehicle for which you are creating the work order.
- **Make:** The make of the vehicle for which you are creating the work order.
- **Year Built:** The year in which the vehicle for which you are creating the work order was built.
- **Transmission:** This is the type of transmission which the vehicle for which you are creating the work order has..
- **Log Odometer Reading:** This is the total number of usage units which have been logged for the vehicle for which you are creating the work order.
- **Vehicle Reference Notes:** Any comments entered about the vehicle will be displayed here.

Clicking on the **Customer** tab displays some data fields containing information about the customer for whom you are servicing the vehicle (unless the vehicle is your own, in which case these fields would be blank). The customer ID number is shown in the **CUSTOMER** field as well as the vendor's name, their street address, city, state, zip code, and country:

CUSTOMER	1	NAME	Hess Machinery	ADDRESS	55689 Evergreen Ct.
CITY	Townsville	ZIP/POSTAL CODE	56874-		
STATE/PROVINCE	IL	COUNTRY	Us		

Below the **Vehicle** and **Customer** data fields and to the left there are also five fields which describe notes about the work order as well as who is creating the work order, who approved it, and to whom the work is actually assigned:

Notes:	<input checked="" type="checkbox"/>	Oil service only
Exceptions:	<input checked="" type="checkbox"/>	Modifications to the stand
Serviced by:		MANAGER
Approved by:		MANAGER
Assigned To :		Jerry

- **Notes:** This is where you enter any notes about this work order. Click inside the box to the right and type any notes you wish to leave. The checkbox next to the field in which you type the notes will be automatically checked to indicate that there are notes for this work order.
- **Exceptions:** This is where you indicate that there are changes made to what is usually prescribed in this maintenance. Click inside the box to the right and type any exceptions you want to note. The checkbox next to the field in which you type exceptions will be automatically checked to indicate that there are exceptions for this work order.
- **Performed By:** This field displays who created the work order and is automatically filled in with the user name of the person who created it.
- **Approved By:** This field displays the person who approved the work order. The person approving the work order would click in this field, which causes a window to pop up prompting them for their username and password. After their username and password have been entered, that users name will be displayed here as the person by whom this work was approved.
- **Assigned To:** From this drop-down box you choose the person to whom you want to assign to be responsible for the work indicated on the work order. Click on the arrow on the right side of the box to expand the list and then click on the person whom you want to assign the work.

To the right of the previous five fields are four pairs of data fields which relate to when the work was scheduled to be performed versus when it was actually performed:

	Scheduled	Actual
Completion Date:	01/13/2005	03/08/2007
Days since last service:	30	0
Odometer:	37000	35075
Miles since last service:	5000	3075

- **Completion Date** (Scheduled and Actual): The left field in this pair shows the date on which the work was scheduled to be completed while the right shows the current date.
- **Days Since Last Service** (Scheduled and Actual): The left field in this pair shows the number of days that were supposed to have elapsed since the last service for the vehicle to be due for maintenance while the right shows the number of days that have actually elapsed.
- **Odometer:** The left field in this pair shows the number of usage units that were supposed to have been logged (for the entire life of the vehicle so far) for the vehicle to be due for maintenance. In the right field you type the amount of total usage units for which the vehicle has been operated. This may include usage units between the last log entry and when this work order was created: in other words, usage units that haven't been logged yet, in which case EZ Maintenance will calculate the difference between the amount you enter here and the last log entry and automatically make a new log entry containing that difference. Otherwise, you can simply enter the amount in that is contained in the **Log Odometer Reading** field above.
- **Miles since last service:** The left field in this pair shows the number of usage units that were supposed to have been logged since the last time this vehicle was serviced for it to be due for maintenance. The right field shows the actual amount of usage units that have been logged since the last service.

To the right of these four pairs of fields is the date on which the next scheduled maintenance is due along with a few options that allow you to choose whether or not the maintenance will be scheduled on a weekend day or not:

Next Due Date

All days Valid

Sat,Sun Excluded

Sun Only Excluded

01/13/2005

Click on the circle called **All Days Valid** to allow scheduling on a weekend day if necessary. Click on the circle called **Sat,Sun Excluded** to disallow scheduling on either weekend day, or click on the circle called **Sun Only Excluded** to disallow scheduling on Sundays but allow on Saturdays. In any case, if the scheduled maintenance is scheduled to fall on a day on which maintenance is disallowed to be scheduled, the maintenance will be scheduled on the last day possible before the day or days on which scheduling is disallowed. The date displayed will be changed to reflect the adjusted schedule if rescheduling is necessary.

Also on the work order window are four fields in which you can record the man hours worked for this maintenance (**Total Labor Hours**), the cost of the hours worked (**Labor Average Cost**), the amount of time the vehicle had to be in the shop to perform the maintenance, (**Vehicle Down Time(hrs)**), and the cost of the parts and materials used in this maintenance (**Total Materials Cost**), and Click in any of these fields and type the desired values:

Total Labor Hours:	<input type="text" value="2.00"/>	Vehicle Down Time(hrs):	<input type="text" value="3.00"/>
Labor Average Cost:	<input type="text" value="80.00"/>	Total Materials Cost:	<input type="text" value="133.4900"/>

Below those four fields you'll see two more fields that display the maintenance profile for the vehicle for which the work order is being created (**Service Profile**) and the type of maintenance that is being performed (**Service Type**):

Service Profile:	<input type="text" value="Light Truck Maintenance"/>	Service Type:	<input type="text" value="Routine Maintenance"/>
-------------------------	--	----------------------	--

At the very bottom of the window is a list of all of the services that are included in the service type for which this work order is being created, and, for each service, the service code is shown (**Service Code**) along with the description of the service (**Service Description**):

Service Code	Service Description
Belt/hose	Belt and hose check and replace
Oil/filter	Oil and filter change
Trans1	Transmission check fluid change

Further down in this section we'll describe how to view and change the materials, parts, and operations used in each of the services listed here.

At the lower right hand corner of the window is a box where you can print the work orders which you have selected:

When you print work orders here, you can choose to print either a full work order or a simpler one that contains only the items you want to include. Notice that there are two circles called **Full Report** and **Custom Report**. To print a full work order for all checked work orders, click on the **Full Report** circle and then click on the **Print Selected** button.

To print a custom work order containing only the items you want to include, first click on the **Custom Report** circle. Then, from the four checkboxes below **Custom Report**, check (by clicking with your mouse) the items which you want to include on the work order: the services included in the work order (**Serv. Summary**), the parts in the work order (**Parts to Service**), the materials in the work order (**Materials**), or the operations needed to perform each service (**Operations**). Once you have selected the items you wish to appear on the printed work order, click on the **Print Selected** button to print all checked work orders.

Full Report

Custom Report:

Serv. Summary

Parts to Service

Materials

Operations

Print Selected

At the bottom of the work order window are the **OK** and **Cancel** buttons. When you have entered all of the information necessary for the work order and want to save it, click on the **OK** button. If you have changed your mind and do not want to create the work order, click on the **Cancel** button.

Closing a Scheduled Work Order

When the work that is prescribed in the work order has been physically completed and you want to mark the work order as closed, first check the checkbox in the center of the work order screen called **Work Order Is Closed**:

Work Order is Closed

After you have clicked on the **Work Order Is Closed** checkbox, then click on the **OK** button to save the work order and close it. The closed work order would then be added to the maintenance history (see further down in this chapter for the topic “Service History / Work Order Approval” for more information on this).

If you would like to simply open a work order and then save it without closing it, then just click on the **OK** button while leaving the **Work Order Is Closed** checkbox unchecked.

Changing the Materials, Parts, or Operations

You can change the materials, parts, and operations used in each service on a work order by using the **Edit** button which is next to the list of service on the work order window. First, select the service whose materials, parts, and operations you want to change by clicking on it with your mouse, and then click on the **Edit** button. This will open up the **Service Details** window:

The screenshot shows the 'Service Details' window. At the top, there are two input fields: 'Service Code' with the value 'Oilfilter' and 'Service Description' with the value 'Oil and filter change'. Below these fields is a table with three columns: 'Materials', 'Operations', and 'Checklist of Parts to Service'. The 'Materials' column contains a table with the following data:

Material Number	Material	Quantity
10W-40	40 Weight motor Oil	1.0
KN 1	Oil Filters	1.0

To the right of the table are 'New' and 'Delete' buttons. At the bottom of the window are 'Delete', 'Ok', and 'Cancel' buttons.

At the top of the window are two fields showing the service which you are editing (**Service Code** and **Service Description**).

Service Code : Oil/filter

Service Description : Oil and filter change

Below those data fields you will see three tabs named “Materials”, “Operations”, and “Checklist of Parts to Service”. Clicking on the **Materials** tab will display a list of the materials that are used in this work order: the material number, the material name, and the quantity used is displayed for each material.

Materials			Operations	Checklist of Parts to Service
Material Number	Material	Quantity		
10W-40	40 Weight motor Oil	1.0		
KN 1	Oil Filters	1.0		

New
Delete

To add a new material to the list, click on the **New** button. A new blank entry will be created in the materials list. To specify what material you want to add to the materials list, select its material number (how it is referred to in inventory) from the drop-down box in the **Material Number** column. The name of the material will automatically display in the **Material** column. After you’ve selected which material you want to add, then you must enter the quantity that is to be used in the maintenance: click on the cell in the column named **Quantity** and type in the desired quantity. To delete a material from the list, select it by clicking on it and then click on the **Delete** button.

If you click on the **Operations** tab, this will display the list of operations to be performed in this work order:

Materials			Operations	Checklist of Parts to Service
Sequence Number	Operation	Operation Description		
1	Oil Replace Filter	memo		
2	Oil Fill Crankcase	memo		

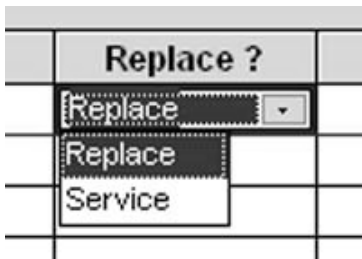
New
Delete

To add a new operation to the list, click on the **New** button. A new blank entry will be created in the operations list. Select the operation you wish to add to the list from the drop-down menu in the **Operation Name** column. Next specify what step # this operation is by clicking on the cell in the **Sequence Number** column and typing in the step #. You can delete an operation from the list by clicking on it to select it and then clicking on the **Delete** button.

Lastly, if you click on the **Checklist of Parts to Service** tab, this will display the list of parts to check and/or replace in this work order:

Materials		Operations		Checklist of Parts to Service	
Part Number	Part	Replace ?	Qty		
E1	Engine	Service	0.0		
P1	Power Steering Assembly	Replace	1.0		

If you need to replace a malfunctioning part that was found during the inspection process of a work order, click on the area below the **Replace** column header and on the same row as the part you want to replace. This will expand a drop-down menu with two options, **Replace** and **Service**:



Click on **Service** if the part simply needs to be serviced, but not replaced with another. Click on **Replace** if you want to mark the part as needing to be replaced with another during this maintenance. Then click on the area below the **Quantity** header and on the same row as the part you want to replace and type in the amount of replacement parts you will need. When you close the work order, the amount you type here will be automatically deducted from your inventory of that part.

To add a new part to the list, click on the **New** button. Then select the number of the part (how it is referred to in inventory) from the drop-down menu in the **Part Number** column. The name of the part will automatically display to the right in the **Part** column. To delete a part from the list, select it by clicking on it and then clicking on the **Delete** button.

When you are finished changing the parts, materials, and operations in the work order, click on the **OK** button to save your changes. If you have changed your mind and do not want to save the changes you made, click on the **Cancel** button to discard any changes and return to the work order.

Unscheduled Vehicle Work Orders

This section discusses how to open a scheduled vehicle work order, how to change the materials, replacement parts, and operations prescribed in the work order, and how to edit and close the unscheduled work order.

Opening an Unscheduled Work Order

To open a new unscheduled work order, you must click on the **New Unscheduled Work Order** button when viewing maintenance either by vehicle, by date, or by usage (see the topic further up in this chapter called "Service Due" for more information on how to do this). This will take you to the unscheduled work order window:

Unscheduled Work Order

Work Order

No:
Date:

Vehicle: <input type="text" value="light truc"/>	Make: <input type="text" value="Dodge"/>	Vehicle Reference Notes
Vehicle No.: <input type="text" value="201"/>	Year Built: <input type="text" value="2001"/>	<input type="text" value="Delivery truck"/>
License Plate: <input type="text" value="8t543ta"/>	Transmission: <input type="text" value="Auto"/>	
VIN: <input type="text" value="23ru984j1lw"/>	Log Odometer Reading: <input type="text" value="32000"/>	

Exceptions <input checked="" type="checkbox"/> Oil check only, do not char Notes <input checked="" type="checkbox"/> Make sure to check tire pr Serviced by: <input type="text" value="MANAGER"/> Approved by: <input type="text" value="MANAGER"/> <input type="checkbox"/> Work Order is Closed	Scheduled Completion Date: <input type="text" value="1 / 1"/> Days since last Service: <input type="text"/> Odometer: <input type="text"/> Miles since last service: <input type="text"/>	Actual Completion Date: <input type="text" value="03/09/2007"/> Odometer: <input type="text" value="34000"/> Miles since last service: <input type="text" value="34000"/>
---	--	---

Total Labor Hours: <input type="text" value="3"/>	Vehicle Down Time: <input type="text" value="4"/>
Labor Average Cost: <input type="text" value="100.0000"/>	Total Materials Cost: <input type="text" value="133.4900"/>

Services

Service Profile: Service Type:

Service Code	Service Description
BeltHose	Belt and hose check and replace
OilFilter	Oil and filter change
Trans1	Transmission check, fluid change

At the top right corner of the window you will see two fields called **No.** and **Date** that display, respectively, the number that this work order has been assigned and the date on which the work order was created:

No:
Date:

Work order numbers are integers and are automatically assigned to work orders by EZ Maintenance in sequential order starting with the number 1. As such, the first work order created would be work order #1, the second would be #2, the third would be #3, and so on and so forth.

At the top of the window you'll also see some data fields that give information about the vehicle for which you are creating the work order:

Vehicle: <input type="text" value="light truc"/>	Make: <input type="text" value="Dodge"/>	Vehicle Reference Notes
Vehicle No.: <input type="text" value="201"/>	Year Built: <input type="text" value="2001"/>	<input type="text" value="Delivery truck"/>
License Plate: <input type="text" value="8t543ta"/>	Transmission: <input type="text" value="Auto"/>	
VIN: <input type="text" value="23ru984j1lw"/>	Log Odometer Reading: <input type="text" value="32000"/>	

First, however, you must select the vehicle for which you want to create the unscheduled work order by selecting either its vehicle number from the **Vehicle No.** drop-down menu. Click on the arrow to the right of the box to expand the list of vehicle numbers, and then click on the vehicle number of the vehicle for which you want to create the work order. Notice that the other fields (whose meaning is described below) automatically fill in with information about the vehicle you have selected:

- **Vehicle:** This is the vehicle name (i.e. what type of vehicle it is) of the vehicle for which you are creating the work order.

- **Vehicle #:** This is the vehicle number of the vehicle for which you are creating the work order which you use to track it in EZ Maintenance.
- **License Plate:** This is the license plate number of the vehicle for which you are creating the work order.
- **VIN:** This is the VIN (vehicle identification number) of the vehicle for which you are creating the work order.
- **Make:** The make of the vehicle for which you are creating the work order.
- **Year Built:** The year in which the vehicle for which you are creating the work order was built.
- **Transmission:** This is the type of transmission which the vehicle for which you are creating the work order has..
- **Log Odometer Reading:** This is the total number of usage units which have been logged for the vehicle for which you are creating the work order.
- **Vehicle Reference Notes:** Any comments entered about the vehicle will be displayed here.

Below the vehicle data fields and to the left there are also four fields which describe notes about the work order as well as who is creating the work order and who approved it:

Exceptions	<input checked="" type="checkbox"/>	Oil check only; do not char
Notes	<input checked="" type="checkbox"/>	Make sure to check tire pri
Serviced by:		MANAGER
Approved by:		MANAGER

- **Notes:** This is where you enter any notes about this work order. Click inside the box to the right and type any notes you wish to leave. The checkbox next to the field in which you type the notes will be automatically checked to indicate that there are notes for this work order.
- **Exceptions:** This is where you indicate that there are changes made to what is usually prescribed in this maintenance. Click inside the box to the right and type any exceptions you want to note. The checkbox next to the field in which you type exceptions will be automatically checked to indicate that there are exceptions for this work order.
- **Serviced By:** This field displays who created the work order and is automatically filled in with the user name of the person who created it.
- **Approved By:** This field displays the person who approved the work order. The person approving the work order would click in this field, which causes a window to pop up prompting them for their username and password. After their username and password have been entered, that users name will be displayed here as the person by whom this work was approved.

To the right of these fields are the **Completion Date / Actual** field and the **Odometer Reading / Actual** field. The **Completion Date / Actual** field displays the date on which this work order is being created (the current date), and the **Odometer Reading / Actual** field is where you enter the current odometer reading for the vehicle for which you are creating the work order; just click in the **Odometer Reading / Actual** box and type in the odometer reading.

Below that there are four fields in which you can record the man hours worked for this maintenance (**Total Labor Hours**), the cost of the hours worked (**Labor Average Cost**), the amount of time the vehicle had to be in the shop to perform the maintenance, (**Vehicle Down Time**), and the cost of the parts and materials used in this maintenance (**Total Materials Cost**), and Click in any of these fields and type the desired values:

Total Labor Hours:	<input type="text" value="3"/>	Vehicle Down Time:	<input type="text" value="4"/>
Labor Average Cost:	<input type="text" value="100.0000"/>	Total Materials Cost:	<input type="text" value="133.4900"/>

Unscheduled work orders are created from scratch and are not for a specific kind of maintenance per se. As such, you will need to select what kind of maintenance this work order will contain. You can do this by selecting the type of maintenance you want to prescribe from the **Service Profile** and **Service Type** drop-down boxes. Click on the arrow on the right side of each box to expand each and make your selection:

Service Profile:	<input type="text" value="Light Truck Maintenance"/>	Service Type:	<input type="text" value="Routine Maintenance"/>
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Once you have selected the service profile and the service type you want, the list immediately below will fill in with the list of services that are included in the service type you selected:

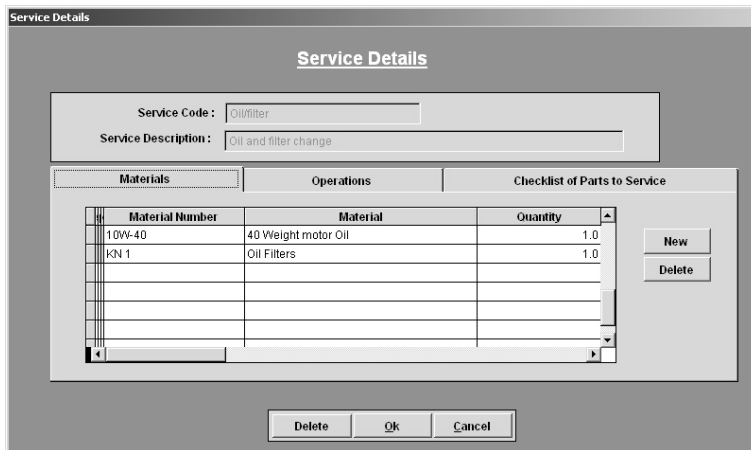
Service Code	Service Description
Belt/hose	Belt and hose check and replace
Oil/filter	Oil and filter change
Trans1	Transmission check, fluid change

Further down in this section we will show how to use the **Edit** button (to the right of the list of services) to change the materials, operations, and parts in each service for the work order you are currently creating.

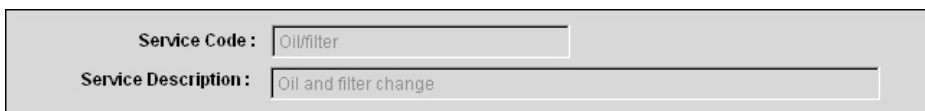
At the right side of the window are three buttons: **Print**, **OK**, and **Cancel**. Click on the **Print** button to print out a full work order. Click on the **OK** button to save the work order, and click on **Cancel** if you have changed your mind and do not want to create the work order.

Changing the Materials, Parts, or Operations

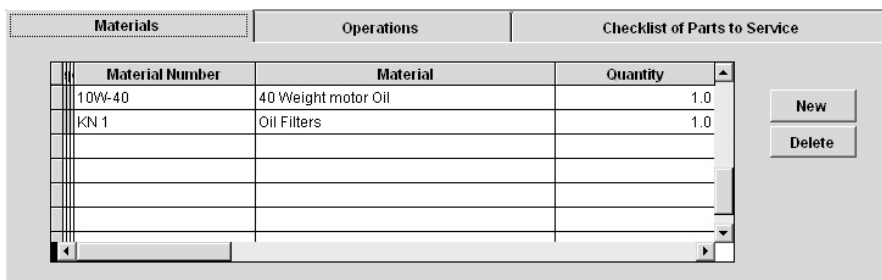
You can change the materials, parts, and operations used in the services listed in the unscheduled work order by using the **Edit** button which is to the right of the list of services in the unscheduled work order window. To change the materials, parts, or operations for a particular service, first select that service from the list by clicking on it and then click on the **Edit** button. This will open up the **Service Details** window:



At the top of the window are two fields showing the service which you are editing (**Service Code** and **Service Description**):



Below those data fields you will see three tabs named “Materials”, “Operations”, and “Checklist of Parts to Service”. Clicking on the **Materials** tab will display a list of the materials that are used in this work order: the material number, the material name, and the quantity used is displayed for each material.



To add a new material to the list, click on the **New** button. A new blank entry will be created in the materials list. To specify what material you want to add to the materials list, select its material number (how it is referred to in inventory) from the drop-down box in the **Material Number** column. The name of the material will automatically display in the **Material** column. After you’ve selected which material you want to add, then you must enter the quantity that is to be used in the maintenance: click on the cell in the column named **Quantity** and type in the desired quantity. To delete a material from the list, select it by clicking on it and then click on the **Delete** button.

If you click on the **Operations** tab, this will display the list of operations to be performed in this work order:

Materials	Operations	Checklist of Parts to Service		
	Sequence Number	Operation	Operation Description	<input type="button" value="New"/> <input type="button" value="Delete"/>
	1	Oil Replace Filter	memo	
	2	Oil Fill Crankcase	memo	

To add a new operation to the list, click on the **New** button. A new blank entry will be created in the operations list. Select the operation you wish to add to the list from the drop-down menu in the **Operation Name** column. Next specify what step # this operation is by clicking on the cell in the **Sequence Number** column and typing in the step #. You can delete an operation from the list by clicking on it to select it and then clicking on the **Delete** button.

Lastly, if you click on the **Checklist of Parts to Service** tab, this will display the list of parts to check and/or replace in this work order:

Materials	Operations	Checklist of Parts to Service				
		Part Number	Part	Replace ?	Qty	<input type="button" value="New"/> <input type="button" value="Delete"/>
		E1	Engine	Service	0.0	
		P1	Power Steering Assembly	Replace	1.0	

If you need to replace a malfunctioning part that was found during the inspection process of a work order, click on the area below the **Replace** column header and on the same row as the part you want to replace. This will expand a drop-down menu with two options, **Replace** and **Service**:

Replace ?
Replace
Replace
Service

Click on **Service** if the part simply needs to be serviced, but not replaced with another. Click on **Replace** if you want to mark the part as needing to be replaced with another during this maintenance. Then click on the area below the **Quantity** header and on the same row as the part you want to replace and type in the

amount of replacement parts you will need. When you close the work order, the amount you type here will be automatically deducted from your inventory of that part.

To add a new part to the list, click on the **New** button. Then select the number of the part (how it is referred to in inventory) from the drop-down menu in the **Part Number** column. The name of the part will automatically display to the right in the **Part** column. To delete a part from the list, select it by clicking on it and then clicking on the **Delete** button.

When you are finished changing the parts, materials, and operations in the work order, click on the **OK** button to save your changes. If you have changed your mind and do not want to save the changes you made, click on the **Cancel** button to discard any changes and return to the work order.

Editing and Closing an Open Unscheduled Work Order

Once an unscheduled work order has been opened, you can return to the work order by viewing maintenance either by vehicle, by date, or by usage and then selecting the work order by clicking on it and clicking on the **Create/Edit Work Order** button. This will open up the **Scheduled Service - Work Order** window:

Scheduled Service - Work Order

No: 9 Date: 03/09/2007

Vehicle: light truck Make: Dodge Year Built: 2001 License Plate: 9F543ta VIN: 23ru984u1lw Transmission: Auto Log Odometer Reading: 34000

Customer: Vehicle Reference Notes: Delivery truck

Notes: Make sure to check tire pressure Oil check only, do not change oil

Exceptions: Oil check only, do not change oil

Serviced by: MANAGER Approved by: MANAGER Assigned To: Jerry

Scheduled: 03/09/2007 Actual: 03/09/2007

Completion Date: / / Days since last service: Odometer: 34000 Miles since last service: 34000

Work Order is Closed

Total Labor Hours: 3.00 Vehicle Down Time (hrs): 4.00 Labor Average Cost: 100.00 Total Materials Cost: 133.4900

Service Profile: Light Truck Maintenance Service Type: Routine Maintenance

List of Services: Checklist of Onboard Supplies

Service Code	Service Description
Belt/hose	Belt and hose check and replace
Oil/filter	Oil and filter change
Transf	Transmission check, fluid change

Print Selected

Cancel OK

In this window you can make the changes you desire. For all intents and purposes, this window functions like the window where you create a regular scheduled work order (see above topic “Scheduled Vehicle Work Orders”).

Unscheduled work orders can be closed in two ways: the first is by using the **Work Order Is Closed** checkbox in the window in which you originally created the unscheduled work order:

Work Order is Closed

You would use this method if you want to close the unscheduled work order immediately after opening it, so that you open and close the work order within the same window. To do this, click on the **Work Order Is Closed** checkbox to check it. Then click on the **OK** button. The work order will then be closed and will

appear in your maintenance history (see further down in this chapter for the topic “Service History / Work Order Approval” for more information on this).

The second method of closing an open unscheduled work order involves finding the work order by viewing maintenance either by vehicle, by date, or by usage will open the **Scheduled Service - Work Order** window, in the center of which you will see a checkbox called **Work Order Is Closed**. Click on the **Work Order Is Closed** checkbox to check it. Then click on the **OK** button. The work order will then be closed and will appear in your maintenance history.

Assign Work Orders

EZ Maintenance has a feature that allows you to view all upcoming and overdue maintenance events and quickly and easily create work orders for them and assign those work orders to the employee of your choice. Here, first the layout of this section of the program is described, and then it is explained how to use it to quickly and easily assign work orders.

When you view maintenance either by vehicle, by date, or by usage, you will notice that at the bottom of the window in which you are viewing maintenance is a button called **Assign Work Orders**. Clicking on this button takes you a window in which you can view all upcoming and overdue maintenance events at a glance:

Service due

WORK ORDERS

Locate by:

Vehicle No.
 Work Order No.

Reports

Full Report
 Custom Report:

Serv. Summary
 Parts to Service
 Materials
 Operations

Click column heading to sort

Next Due	Work Order No.	To Print	Assigned To	Vehicle Number	Vehicle	Type	Frequency (Months)
01/13/05		<input type="checkbox"/>		201	light truck	Routine Maintenance	1
01/13/05		<input type="checkbox"/>		202	light truck	Routine Maintenance	1
01/13/05	7	<input checked="" type="checkbox"/>	Jerry	200	light truck	Routine Maintenance	1
02/12/05		<input type="checkbox"/>		201	light truck	Transmission Maintenance	2
02/12/05	8	<input checked="" type="checkbox"/>	Manager	202	light truck	Cooling System Maintenance	2
02/12/05	9	<input checked="" type="checkbox"/>	ravi	202	light truck	Transmission Maintenance	2
02/12/05	10	<input checked="" type="checkbox"/>	Jerry	200	light truck	Cooling System Maintenance	2
02/12/05		<input type="checkbox"/>		200	light truck	Transmission Maintenance	2
02/15/05		<input type="checkbox"/>		201	light truck	Cooling System Maintenance	2

Notice that in the center of the window you can see the list of all upcoming and overdue maintenance events:

Next Due	Work Order No.	To Print	Assigned To	Vehicle Number	Vehicle	Type	Frequency (Months)
01/13/05		<input type="checkbox"/>		201	light truck	Routine Maintenance	1
01/13/05		<input type="checkbox"/>		202	light truck	Routine Maintenance	1
01/13/05	7	<input checked="" type="checkbox"/>	Jerry	200	light truck	Routine Maintenance	1
02/12/05		<input type="checkbox"/>		201	light truck	Transmission Maintenance	2
02/12/05	8	<input checked="" type="checkbox"/>	Manager	202	light truck	Cooling System Maintenance	2
02/12/05	9	<input checked="" type="checkbox"/>	ravi	202	light truck	Transmission Maintenance	2
02/12/05	10	<input checked="" type="checkbox"/>	Jerry	200	light truck	Cooling System Maintenance	2
02/12/05		<input checked="" type="checkbox"/>		200	light truck	Transmission Maintenance	2
02/15/05		<input type="checkbox"/>		201	light truck	Cooling System Maintenance	2

For each maintenance event, the following data items are shown (going from left to right):

- **Next Due:** When this maintenance is due to be performed. If the scheduled maintenance goes beyond the due date, the due date shown here will be shown in red text.
- **W.O. Number:** If a work order has been created for this event, the number of the work order is shown here. If no work order has been created yet, no work order number will be displayed.
- **Assigned To:** This box displays the person to whom this maintenance event / work order has been assigned. Further down in this section it will be explained how to use this to quickly and easily create work orders and assign to them to your personnel.
- **Vehicle Number:** This is the internal identifying number for the vehicle for which this maintenance event is scheduled.
- **Vehicle.:** This is the vehicle name (i.e. type of vehicle) of the vehicle for which this maintenance event is scheduled.
- **Type:** What kind of maintenance this scheduled event is.
- **Frequency (Months):** How frequently this maintenance occurs (in number of months).

Also notice that between the **Work Order No.** column and the **Assigned To** column there is a column with the header **To Print** that contains a checkbox in every row. If you want to print the work orders for scheduled maintenance events, the corresponding checkbox for that event must be checked. Printing work orders is discussed further down in this section.

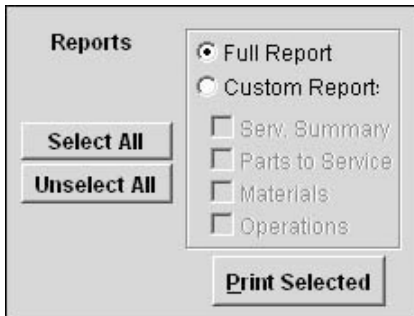
Above the list of maintenance events there is a search box which you can use to either to locate the maintenance events for a particular vehicle in EZ Maintenance if you know its vehicle number, or you can locate a work order if you know the work order number:

To search for the maintenance events for a particular vehicle, first click on the circle called **Vehicle No.**. Then click on the box to the right and type the vehicle number of the vehicle which you want to locate, and then click on the **Locate** button. If a vehicle with the vehicle number which you typed exists in EZ Maintenance, the first maintenance event listed will be selected. Now, if you click the **Locate Next** button, the next maintenance event that listed for that vehicle will be selected. You can repeatedly use the **Locate Next** button in this fashion to scroll through all of the maintenance events for a particular vehicle.

To locate a work order, first click on the circle called **Work Order No.**. Then click on the box to the right and type the number of the work order which you want to locate, and then click on the **Locate** button. If

there is a work order for a maintenance event which has the number that you typed, it will be selected in the list of maintenance events.

At the upper right hand corner of the window is a box where you can print the work orders which you have selected:



When you print work orders here, you can choose to print either a full work order or a simpler one that contains only the items you want to include. Notice that there are two circles called **Full Report** and **Custom Report**. To print a full work order for all checked work orders, click on the **Full Report** circle and then click on the **Print Selected** button.

To print a custom work order containing only the items you want to include, first click on the **Custom Report** circle. Then, from the four checkboxes below **Custom Report**, check (by clicking with your mouse) the items which you want to include on the work order: the services included in the work order (**Serv. Summary**), the parts in the work order (**Parts to Service**), the materials in the work order (**Materials**), or the operations needed to perform each service (**Operations**). Once you have selected the items you wish to appear on the printed work order, click on the **Print Selected** button to print all checked work orders.

You can also click on the **Select All** or **Unselect All** buttons to check all work orders or ensure that all work orders are unchecked, respectively.

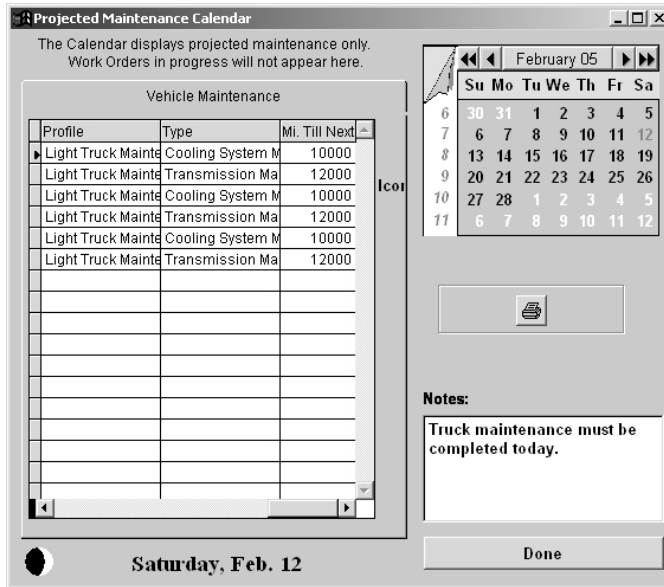
Lastly, at the bottom of the window, there are three buttons: **Assign**, **Print**, and **Close**. The function of the **Assign** button is explained further on in this section. Clicking on the **Print** button will print a complete list of all upcoming and overdue maintenance events including their corresponding work order number if a work order has been created for them. Click on **Close** when you are finished in this window to exit.

To quickly create work orders and assign them to personnel, you must use the drop-down boxes under the **Assigned To** column and the **Assign** button at the bottom of the window.

To create a work order for a maintenance event and assign it to somebody, first locate the maintenance event for which you want to create the work order in the list of upcoming and due maintenance events. Then look to the right for the drop-down box under the **Assigned To** column. Click on the small arrow on the right side of the box to expand the list of people to whom you can assign the work order, and then click on the person whom you want to assign the work order. Next, click on the **Assign** button. Notice that the maintenance event you have selected now has a corresponding work order number under the **W.O. Number** column. This means that the work order has been created and it is assigned to the person you selected. Repeat this procedure on any remaining maintenance events for which you want to create work orders and assign them to somebody.

Using the Calendar Feature

The calendar feature of EZ Maintenance allows you to view what maintenance events are due on any given day. The **Projected Maintenance Calendar** window is shown below:



At the left side of the window is a list of all the maintenance events that are scheduled for the day that is currently selected. This list shows only those maintenance events for which a work order has not yet been created:

Profile	Type	Mi. Till Next
Light Truck Mainte	Cooling System M	10000
Light Truck Mainte	Transmission Ma	12000
Light Truck Mainte	Cooling System M	10000
Light Truck Mainte	Transmission Ma	12000
Light Truck Mainte	Cooling System M	10000
Light Truck Mainte	Transmission Ma	12000

For each maintenance event you will see the following data items:

- **Next Due:** When this maintenance is due to be performed, which will be, of course, the date that is currently selected.
- **Vehicle.:** This is the vehicle name (i.e. type of vehicle) of the vehicle for which this maintenance event is scheduled.
- **Profile:** The service profile for the vehicle for which this maintenance event is scheduled.
- **Type:** What kind of maintenance this scheduled event is.
- **Miles Left:** This is the amount of usage units (such as miles) that need to be logged until the vehicle is due for maintenance. If the amount logged goes beyond the point at which the vehicle is scheduled for maintenance, this number will be displayed as a negative number in red text

showing the number of usage units that have been logged since the piece of vehicle became due for maintenance.

At the upper right hand corner of the **Projected Maintenance Calendar** window is a calendar:



You can click on one of the actual days to select it, and the list of maintenance events on the left side of the window will be updated with the maintenance events that are due on that day. The day you selected will be highlighted in red text on the calendar itself, and it will also be displayed at the bottom of the window under the list of maintenance events.

To move forward a week, click on the upper left hand corner of the calendar. To move forward or backwards by one year, click on the >> or << buttons at the top of the calendar respectively. To move forward or backward by one month, click on the < or > buttons at the top of the calendar respectively. You can also go to any month of any year you wish by double clicking on any of the days in the calendar, which will pop up a window:



Click on the arrow on the right side of the drop-down box called **Month**, which will expand the list of months, and then click on the month you want to select. Then, in the box called **Year** either click in the box and type the year which you want to select or click on the up or down arrows on the right side of the box to advance the year forwards or backwards respectively. Click **OK** when you have selected your desired month and year, or click **Cancel** to abort.

Also notice that at the bottom left hand corner of the window there is a **Notes** box:

Notes:

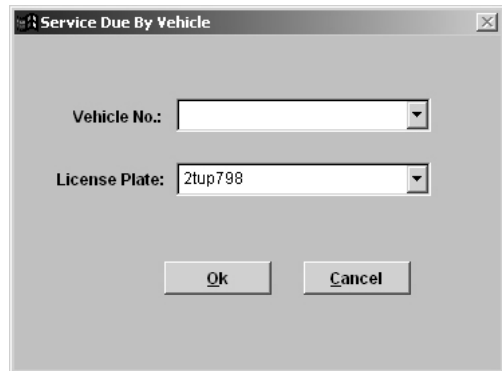
Truck maintenance must be completed today.

You can leave notes for any day by selecting a day from the calendar and then typing notes into this field. To leave notes, simply click inside the **Notes** box and then type your desired notes. Now when that date is selected in the future, those notes will be displayed.

Print Service Due

Clicking on the **Print Service Due** button on the main menu of EZ Maintenance takes you to the **Service Due by Vehicle** window where you can print a report showing all upcoming and overdue maintenance events for vehicles:

First you must choose the vehicle for which you want to print a maintenance report. Here you can specify the vehicle for which you want to print the report by choosing its vehicle number from the **Vehicle No.** drop-down box or by choosing its license plate number from the **License Plate** drop-down box. Click on the arrow on the right side of either drop-down box to expand either the list of vehicle numbers or the list of license plate numbers of the vehicles which you've entered into EZ Maintenance. Then, depending on which drop-down box you are choosing from, select either the vehicle number or the license plate number of the vehicle for which you want to print the maintenance report.



The screenshot shows a dialog box titled "Service Due By Vehicle". It contains two drop-down menus. The first is labeled "Vehicle No." and is currently empty. The second is labeled "License Plate:" and contains the text "2tup798". Below the menus are two buttons: "OK" and "Cancel".

Once you have selected either a vehicle number or a license plate number, then click the **OK** button to print the report. Click on the **Cancel** button if you have changed your mind and do not want to print the report; this will take you back to the EZ Maintenance main menu.

Maintenance History / Work Order Approval

Clicking on the **Serv. History View/Approve/Edit** button on the main menu of EZ Maintenance takes you to the **Service Record Approval** window where you can view the entire history of closed work orders for vehicle maintenance, and where a supervisor can “sign off” on work orders to approve them:

Service Record Approval

Locate by:

Vehicle No.

License

Work Order No.

Locate

Click column heading to sort

Work Order No.	Vehicle No.	Vehicle License	Completion Date	Service Type	Profile	Assigned To	Serviced by	Approved by
1 100	4ut098		12/17/04	Routine Mainte	Van Service		manager	MANAGER
2 201	8t543ta		12/17/04	Cooling System	Light Truck M		manager	MANAGER
3 300	84pr673		12/20/04	Cooling System	Passenger C		manager	MANAGER
4 100	4ut098		12/20/04	Routine Mainte	Van Service		manager	MANAGER
7 202			03/13/07	Routine Mainte	Light Truck M		manager	MANAGER
8 300			03/13/07	Cooling System	Passenger C		manager	MANAGER

Edit Close

Notice that in the center of the window there is a list that shows the entire history of closed work orders for vehicle maintenance:

Work Order No.	Vehicle No.	Vehicle License	Completion Date	Service Type	Profile	Assigned To	Serviced by	Approved by
1 100	4ut098		12/17/04	Routine Mainte	Van Service		manager	MANAGER
2 201	8t543ta		12/17/04	Cooling System	Light Truck M		manager	MANAGER
3 300	84pr673		12/20/04	Cooling System	Passenger C		manager	MANAGER
4 100	4ut098		12/20/04	Routine Mainte	Van Service		manager	MANAGER
7 202			03/13/07	Routine Mainte	Light Truck M		manager	MANAGER
8 300			03/13/07	Cooling System	Passenger C		manager	MANAGER

For each closed work order in the list, there are the following data items (going from left to right):

- **Work Order No.:** This is the number that was assigned to the work order.
- **Vehicle Number:** This is the internal identifying number for the vehicle for which this work order was created.
- **Vehicle License:** This is the license plate number for the vehicle for which this work order was created.
- **Completion Date:** This is the date on which the work order was closed.
- **Service Type:** What kind of maintenance for which this work order was created.
- **Profile:** This is the service profile which defines the maintenance requirements for the vehicle for which this work order was created.
- **Assigned To:** This is the person to whom the work order was assigned.
- **Serviced By:** This is the person who created the work order.
- **Approved By:** This is the person who signed off on the work order.

Above the list of vehicles there is a search box which you can use to either to locate a particular vehicle in the work order history if you know its vehicle number or license plate number, or you can locate a work order if you know the work order number:

The image shows a software interface for searching vehicles. It features a section titled "Locate by:" with three radio button options: "Vehicle No." (which is selected), "License", and "Work Order No.". To the right of these options is a rectangular text input box. Below the input box is a button labeled "Locate".

To search for a particular vehicle by its vehicle number, first click on the circle called **Vehicle No.**. Then click on the box to the right and type the vehicle number of the vehicle which you want to locate, and then click on the **Locate** button. If a vehicle with the vehicle number which you typed exists in EZ Maintenance, the last work order listed will be selected.

Similarly, to search for a particular vehicle by its license plate number, first click on the circle called **License**. Then click on the box to the right and type the license plate number of the vehicle which you want to locate, and then click on the **Locate** button. If a vehicle with the license plate number which you typed exists in EZ Maintenance, the last work order listed will be selected.

If you want to search for a work order, then click on the circle called **Work Order Number**. Then click in the box to the right and type the number of the work order which you want to search for. Then click on the **Locate** button. If there is a work order in the history matching the number you typed in the search box, it will be selected in the below list.

Lastly, at the bottom of the window are two buttons: **Edit** and **Close**. To view the details of a particular work order or “sign off” on it, select the work order from the history list by clicking on it and then click on the **Edit** button (this is discussed in detail in the next part of this section). To exit the **Service Record Approval** window and return to the EZ Maintenance main menu, click on the **Close** button.

Work Order Approval / Editing

You can select a work order at the **Approval** window and then click on the **Edit** button to view additional details about these work orders, how to change some details if necessary, and how to “sign off” or approve a work order. You will be taken to the **Service Approval Edit** window:

Service Approval Edit

Work Order

No:
Date: 03/13/2007

Vehicle: <input type="text" value="light truc"/>	Make: <input type="text" value="Ford"/>	Vehicle Reference Notes	
Vehicle No.: <input type="text" value="202"/>	Year Built: <input type="text" value="2003"/>	Delivery vehicle.	
License Plate: <input type="text" value="2tup798"/>	Transmission: <input type="text" value="Auto"/>		
VIN: <input type="text" value="85r4ty67ikm"/>	Log Odometer Reading: <input type="text" value="13000"/>		

Exceptions <input checked="" type="checkbox"/> Check oil only, do not cha Notes <input checked="" type="checkbox"/> Ensure tire pressure chec Serviced by: <input type="text" value="manager"/> Approved by: <input type="text" value="MANAGER"/> <input checked="" type="checkbox"/> Work Order is Closed	Completion Date: <input type="text" value="01/13/2005"/> <input type="text" value="03/13/2007"/> Days since last Service: <input type="text" value="30"/> <input type="text" value="819"/> Odometer: <input type="text" value="5000"/> <input type="text" value="13000"/> Miles since last service: <input type="text" value="5000"/> <input type="text" value="13000"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Scheduled</th> <th style="width: 50%;">Actual</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="01/13/2005"/></td> <td><input type="text" value="03/13/2007"/></td> </tr> <tr> <td><input type="text" value="30"/></td> <td><input type="text" value="819"/></td> </tr> <tr> <td><input type="text" value="5000"/></td> <td><input type="text" value="13000"/></td> </tr> <tr> <td><input type="text" value="5000"/></td> <td><input type="text" value="13000"/></td> </tr> </tbody> </table>	Scheduled	Actual	<input type="text" value="01/13/2005"/>	<input type="text" value="03/13/2007"/>	<input type="text" value="30"/>	<input type="text" value="819"/>	<input type="text" value="5000"/>	<input type="text" value="13000"/>	<input type="text" value="5000"/>	<input type="text" value="13000"/>
Scheduled	Actual											
<input type="text" value="01/13/2005"/>	<input type="text" value="03/13/2007"/>											
<input type="text" value="30"/>	<input type="text" value="819"/>											
<input type="text" value="5000"/>	<input type="text" value="13000"/>											
<input type="text" value="5000"/>	<input type="text" value="13000"/>											

Total Labor Hours: <input type="text" value="4"/>	Vehicle Down Time(Hrs): <input type="text" value="5"/>	
Labor Average Cost: <input type="text" value="200.0000"/>	Total Materials Cost: <input type="text" value="133.4900"/>	

Services

Service Profile: Service Type:

Service Code	Service Description
Belt/hose	Belt and hose check and replace
Oil/filter	Oil and filter change
Trans1	Transmission check, fluid change

Parts to Service
 Serv. Summary
 Materials
 Operations

At the top right corner of the window you will see two fields called **No.** and **Date** that display, respectively, the number that this work order has been assigned and the date on which the work order was created:

No: <input type="text" value="7"/>
Date: <input type="text" value="03/13/2007"/>

At the top of the window you'll also see some data fields that give information about the vehicle for which the work order was created:

Vehicle: <input type="text" value="light truc"/>	Make: <input type="text" value="Ford"/>	Vehicle Reference Notes
Vehicle No.: <input type="text" value="202"/>	Year Built: <input type="text" value="2003"/>	Delivery vehicle.
License Plate: <input type="text" value="2tup798"/>	Transmission: <input type="text" value="Auto"/>	
VIN: <input type="text" value="85r4ty67ikm"/>	Log Odometer Reading: <input type="text" value="13000"/>	

- **Vehicle:** This is the vehicle name (i.e. what type of vehicle it is) of the vehicle for which you are creating the work order.
- **Vehicle #:** This is the vehicle number of the vehicle for which you are creating the work order which you use to track it in EZ Maintenance.
- **License Plate:** This is the license plate number of the vehicle for which you are creating the work order.
- **VIN:** This is the VIN (vehicle identification number) of the vehicle for which you are creating the work order.
- **Make:** The make of the vehicle for which you are creating the work order.
- **Year Built:** The year in which the vehicle for which you are creating the work order was built.
- **Transmission:** This is the type of transmission which the vehicle for which you are creating the work order has..

- **Log Odometer Reading:** This is the total number of usage units which have been logged for the vehicle for which you are creating the work order.
- **Vehicle Reference Notes:** Any comments entered about the vehicle will be displayed here.

Below the vehicle data fields and to the left there are also four fields which describe notes about the work order as well as who created the work order and who approved it. These fields can be changed after the work order has been closed:

Exceptions	<input checked="" type="checkbox"/>	Check oil only; do not cha
Notes	<input checked="" type="checkbox"/>	Ensure tire pressure chec
Serviced by:		manager
Approved by:		MANAGER

- **Notes:** This is where you enter any notes about this work order. Click inside the box to the right and type any notes you wish to leave. The checkbox next to the field in which you type the notes will be automatically checked to indicate that there are notes for this work order.
- **Exceptions:** This is where you indicate that there are changes made to what is usually prescribed in this maintenance. Click inside the box to the right and type any exceptions you want to note. The checkbox next to the field in which you type exceptions will be automatically checked to indicate that there are exceptions for this work order.
- **Serviced By:** This field displays who created the work order and is automatically filled in with the user name of the person who created it.
- **Approved By:** This field displays the person who approved the work order. The person approving the work order would click in this field, which causes a window to pop up prompting them for their username and password. After their username and password have been entered, that users name will be displayed here as the person by whom this work was approved.

To the right of the previous four fields are four pairs of data fields which relate to when the work was scheduled to be performed versus when it was actually performed:

	Scheduled	Actual
Completion Date:	01/13/2005	03/13/2007
Days since last Service:	30	819
Odometer:	5000	13000
Miles since last service:	5000	13000

- **Completion Date (Scheduled and Actual):** The left field in this pair shows the date on which this work was scheduled to be completed while the right shows the date on which the work order was actually created.
- **Days Since Last Service (Scheduled and Actual):** The left field in this pair shows the number of days that were supposed to have elapsed since the last service for the vehicle to be due for this maintenance while the right shows the number of days that had actually elapsed when this work order was created.
- **Odometer:** The left field in this pair shows the number of usage units that were supposed to have been logged (for the entire life of the vehicle so far) for the vehicle to be due for this maintenance.

In the right field is total usage units for which the vehicle had been operated at the time of the creation of this work order.

- **Miles since last service:** The left field in this pair shows the number of usage units that were supposed to have been logged since the last time this vehicle was serviced for it to be due this maintenance. The right field shows the actual amount of usage units that had been logged since the last service.

Also on the work order window are four fields in which you can record the man hours worked for this maintenance (**Total Labor Hours**), the cost of the hours worked (**Labor Average Cost**), the amount of time the vehicle had to be in the shop to perform the maintenance, (**Vehicle Down Time(hrs)**), and the cost of the parts and materials used in this maintenance (**Total Materials Cost**), and Click in any of these fields and type the desired values:

Total Labor Hours:	<input type="text" value="4"/>	Vehicle Down Time(hrs):	<input type="text" value="5"/>
Labor Average Cost:	<input type="text" value="200.00"/>	Total Materials Cost:	<input type="text" value="133.49"/>

Below those four fields you'll see two more fields that display the maintenance profile for the vehicle for which the work order is being created (**Service Profile**) and the type of maintenance that is being performed (**Service Type**):

Service Profile:	<input type="text" value="Light Truck Maintenance"/>	Service Type:	<input type="text" value="Routine Maintenance"/>
-------------------------	--	----------------------	--

At the very bottom of the window is a list of all of the services that are included in the service type for which this work order is being created, and, for each service, the service code is shown (**Service Code**) along with the description of the service (**Service Description**):

Service Code	Service Description
Belt/hose	Belt and hose check and replace
Oil/filter	Oil and filter change
Trans1	Transmission check, fluid change

To the right of the list of services there is a **View Details** button. If you select a service by clicking on it and then click on the **View Details** button, you can view all of the materials, operations, and parts included in that service. (This is discussed in depth further down in this topic).

On the very right part of the window there is a box where you can print the work order that you are currently viewing. You can select the items you want to include on the work order by checking the boxes called **Parts to Service**, **Serv. Summary**, **Materials**, and **Operations**:

Reports

Parts to Service

Serv. Summary

Materials

Operations

Print

When you have selected all of the items you want to print on the work order, then click on the **Print** button; the work order will print with all of the items that you checked.

Lastly, in the lower-right corner of the window there are two buttons: **OK** and **Cancel**. Click on the **OK** button save your changes, exit from the **Service Edit Approval** window and return to the list of closed work orders. If you want to exit back to the list of closed work orders without saving your changes, then click on the **Cancel** button.

View Details Button

Selecting a service and then clicking on the **View Details** button on the **Approval** window takes you to the **Service Details** window where you can view the materials, operations, and parts used in the service on the work order:

Service Details

Service Code : Oilfilter

Service Description : Oil and filter change

Material Number	Material	Quantity
10W-40	40 Weight motor Oil	1.0
KN 1	Oil Filters	1.0

Operations

Checklist of Parts to Service

New

Delete

Delete **Ok** **Cancel**

At the top of the window are two fields showing the service which you are viewing (**Service Code** and **Service Description**):

Service Code : Oilfilter

Service Description : Oil and filter change

Below those data fields you will see three tabs named “Materials”, “Operations”, and “Checklist of Parts to Service”. Clicking on the **Materials** tab will display a list of the materials that are used in this work order: the material number, the material name, and the quantity used is displayed for each material.

Materials			Operations	Checklist of Parts to Service
Material Number	Material	Quantity		
10W-40	40 Weight motor Oil	1.0		
KN 1	Oil Filters	1.0		

If you click on the **Operations** tab, this will display the list of operations to be performed in this work order:

Materials			Operations	Checklist of Parts to Service
Sequence Number	Operation	Operation Description		
1	Oil Replace Filter	memo		
2	Oil Fill Crankcase	memo		

Lastly, if you click on the **Checklist of Parts to Service** tab, this will display the list of parts to check and/or replace in this work order:

Materials			Operations	Checklist of Parts to Service
Part Number	Part	Replace ?	Qty	
E1	Engine	Service	0.0	
P1	Power Steering Assembly	Replace	1.0	

Print Vehicle Service Log

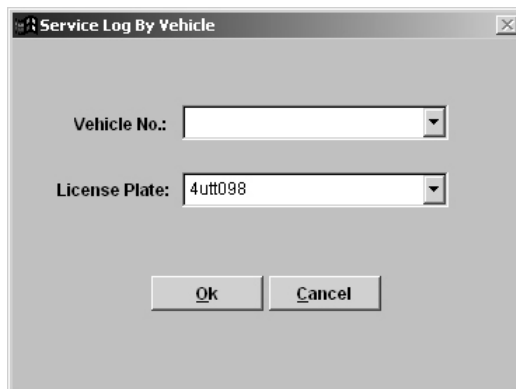
EZ Maintenance has a feature that allows you to print a complete maintenance history for a particular vehicle. Clicking on the **Print Vehicle Service Log** button on the EZ Maintenance main menu takes you to a window that allows you to do this:

When selecting a vehicle for which you want to print a maintenance history, you will have to select either the vehicle number or the license plate number for that vehicle.

Notice that in this window are two drop-down boxes called **Vehicle No.** and **License Plate**. To choose a vehicle by selecting its vehicle number, use the **Vehicle No.** drop-down box. Click on the arrow on the right side of the box to expand the list and then click on the vehicle number of the vehicle for which you want to print a maintenance history.

Or, to choose a vehicle by selecting its license plate number, use the **License Plate** drop-down box.

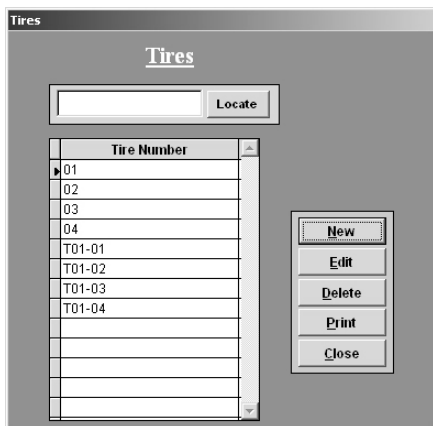
Click on the arrow on the right side of the box to expand the list and then click on the license plate number of the vehicle for which you want to print a maintenance history.



Once you have selected either an vehicle number or a license plate number of a vehicle, then click on the **OK** button to print out the maintenance history for it. Otherwise, click on the **Cancel** button if you have changed your mind and would like to cancel printing.

Tire Mileage and Rotation

EZ Maintenance has a feature that allows you to keep track of how the tires on your vehicles are rotated and the number of miles for which they are driven. To use this feature, click on the **Tire Mileage and Rotation** button on the main menu of EZ Maintenance; this will open up the **Tires** window, which displays a list of all of the tires which you are currently tracking:



Each tire has its own alphanumeric internal tracking number which is shown in the list of tires in the window. If you want to search for a particular tire and know its number, use the search box at the top of the **Tires** window:



Click in the box to place your cursor in the box, and then type the tire number. Then click on the **Locate** button. If a tire exists that matches the number you typed, then it will be selected in the list below.

On the right side of the window are four buttons:

- **New:** Click on the **New** button to enter a new tire into EZ Maintenance. This will be discussed in detail further down in this section.
- **Edit:** The **Edit** button lets you change the information for an existing tire. To edit a particular tire, select that tire from the list by clicking on it, and then click on the **Edit** button. This will be discussed in detail further down in this section.
- **Delete:** The **Delete** button lets you delete a tire when you no longer want to track it. To delete a tire, select that tire from the list by clicking on it, and then click on the **Delete** button.
- **Print:** Clicking on the **Print** button lets you print out a list of all of the tires currently entered into the program.
- **Close:** Clicking on the **Close** button exits from this section of the program and returns you to the EZ Maintenance main menu.

Entering a New Tire

As described before, you can use the **New** button on the **Tires** window to enter a new tire into the program. Clicking on the **New** button brings you to the **Tire Rotation Record** window where you enter the information about the tire you are entering into EZ Maintenance:

Tire Rotation Record

Tire Rotation Record

Tire No.: Miles on Tire:

Name: Tire Status:

Size: Comments:

Lease Start: Lease End:

Tire Movement

Date of Mo.	To Vehicle	To Position	Start Odom.	End Odom.	Mileage	Accum. miles	Status

Recalc
New
Delete

New OK Delete Print Cancel

At the top of the window are eight fields into which you enter information about the tire:

- **Tire No.:** This is an internal tracking number that you arbitrarily choose in order to identify the tire you are entering. Click in the box and type in the number you wish to use to identify the tire.
- **Name:** This is where you enter the brand and type of tire.
- **Size:** This is where you enter the size of the tire. Click in the box and type in the size of the tire.
- **Lease Start:** If this tire is leased, this is the date of the start of the lease. Click in the box and type the start date of the lease in the format mm/dd/yyyy.
- **Miles on Tire:** This field shows the total number of miles on the tire.

- **Tire Status:** This is where you enter the current status of the tire. Click in the box and type in the status which indicates the current state of the tire. Later, you can also re-use the status name you typed by clicking on the arrow on the right side of the box and choosing the same name again.
- **Comments:** Enter any comments about the tire here. Click in the box and type in your desired comments.
- **Lease End:** If this tire is leased, this is the date of the end of the lease. Click in the box and type the end date of the lease in the format mm/dd/yyyy.

Below the aforementioned data fields there is a table which is used to track the actual tire rotation:

Date of Mo.	To Vehicle	To Position	Start Odom.	End Odom.	Mileage	Accum. miles	Status
01/15/07	100	rear-left	6232	11986	5754	11986	worn
02/03/07	200	rear-right	51781	57888	6107	18093	retread
02/28/07	200	front-right	57888	64010	6122	24215	good

Each list item (or row) in the table represents each time a tire was rotated and gives additional information about the rotation including for how many miles the tire was driven in that position and the condition of the tire at the time of the rotation. To the right of the table are three buttons which let you manage these entries:

- **Recalc:** Clicking on the **Recalc** button adjusts the values in the **Accum. Miles** column to reflect newly added and deleted entries in the list.
- **New:** Clicking on the **New** button adds a new blank tire rotation entry to the list. See further down for information on how to enter the data for the new entry.
- **Delete:** The **Delete** button lets you delete a tire entry rotation. To delete an entry, click on it to select it, then click on the **Delete** button.

For each tire rotation entry, there are several data items that are shown. With the exception of the entries in the **Mileage** and **Accum. Miles** columns (which are calculated automatically), each time you create a new tire rotation entry you must enter the information about it. Here's a summary of the data items for each tire rotation entry (from left to right as seen in the table):

- **Date of Mo.:** This is the date on which the rotation took place. Click in the cell and type the date of the rotation in the format mm/dd/yyyy.
- **To Vehicle:** This is the vehicle on which the tire was located for the miles that were logged here. The drop-down box here contains the vehicle numbers for all of the vehicles currently entered into EZ Maintenance. Click on the arrow on the right side of the box to expand the list of vehicle numbers and click on the vehicle number that corresponds with the vehicle on which the tire is/was located.
- **To Position:** This designates where on the vehicle the tire was located. Examples of tire position are "front right", "rear left", etc.; these examples, of course, would not be entirely appropriate for vehicles with more than four wheels, in which case you would need to make up your own position designations. To specify a designation, click in the box and type the designation you wish. The designations you type are saved for later use. Later, you can also re-use the tire position designation you typed by clicking on the arrow on the right side of the box and choosing the same one again.
- **Start Odom.:** This is the odometer reading of the vehicle at the time when the tire is first placed at its new position on the vehicle. Click in the cell and type the beginning odometer reading.
- **End Odom.:** This is the odometer reading of the vehicle at the time immediately before the tire is rotated to another position on the vehicle. Click in the cell and type the end odometer reading.

- **Mileage:** This is the total mileage driven with the wheel in one position. This field is automatically calculated by taking the difference between the values in the **End Odom.** and **Start Odom.** fields.
- **Accum. Miles:** This is the total mileage for the life of the tire so far. This field is automatically calculated by adding the **Mileage** field to the value for **Accum. Miles** in the previous entry.
- **Status:** This is the status of the tire at the end of having been in this position. Click in the box and type the status.

Once you have finished entering all the information for your new tire, click on the **OK** button at the bottom of the window to save all of the information you have entered, or click on **Cancel** if you have changed your mind and do not want to create the new tire. If you want to save the tire you are entering and also want to enter another one, then click on the **New** button.

You can also click on the **Print** button at the bottom of the window to print a report showing all tire rotation entries. Clicking on the **Delete** button will discard all information you've entered so far and open up the **Tire Rotation Record** window again, but with no information entered.

Editing an Existing Tire

To edit an existing tire, you must use the **Edit** button on the **Tires** window as described at the beginning of this section. Select a tire by clicking on it and then click on the **Edit** button. This will open up the **Tire Rotation Record** window, which is similar to the window in which you enter a new tire, but with a few changes:

Tire Rotation Record

Locate:
Tire No.:

Tire No.: Miles on Tire:
 Name: Tire Status:
 Size: Comments:
 Lease Start: Lease End:

Tire Movement

Date of Mo.	To Vehicle	To Position	Start Odom.	End Odom.	Mileage	Accum. miles	Status
01/15/07	100	rear-left	6232	11988	5754	11988	worn
02/03/07	200	rear-right	51781	57888	6107	18093	retread
02/28/07	200	front-right	57888	64010	6122	24215	good

Recalc
New
Delete

OK Delete Print Cancel

The first change you may notice is that in the upper right hand corner of the window there is a box which you can use to locate a particular tire in the program if you know its tire number:

Tire No.:

Type the tire number into the box and then hit the return key. If a tire exists in EZ Maintenance with the number you typed in, the window will automatically be updated to display the information for that tire, which you can then edit.

Also, the **Tire No.** field is disabled to prevent any changes. The tire number may not be changed after the tire is created.

Once you are finished making changes to the tire, click on the **OK** button at the bottom of the window to save your changes. If you have changed your mind and do not want to save the changes you have made, then click on the **Cancel** button.

Print Tire Position Report

EZ Maintenance has a feature that allows you to print the entire rotation and mileage history for a specific tire which you have entered into the program. To use this feature, click on the **Print Tire Position Report** button on the EZ Maintenance main menu. This will open up a small window:

You must first select the tire for which you want to print the report. You do this by choosing the tire number that corresponds with the tire for which you want to print the report from the **Tire Number** drop-down box in the center of the window. Just click on the arrow on the right side of the box to expand the list of tire numbers, and click on the tire number for which you want to print the report. Once you have selected the tire, then click on the **Print** button to print the report. Or click on the **Cancel** button if you have changed your mind and do not want to print the report.

Entering Drivers Into EZ Maintenance

EZ Maintenance has a feature that lets you track your company's drivers, their drivers licenses, and any incidents they have been involved in or any citations they have received. To use this feature, click on the **Drivers** button on the EZ Maintenance main menu. This will open up the **Drivers** window:

Driver No.	First Name	Last Name	Address	City	State	Zip Code	Phone
01	Eric	Sim	23658 Apple	Saugus	CA - California	91390	(661)-286 0046
02	Adam	Kane	50886 Ridgel	Valencia	CA - California	91350	(661)-286 0021
03	Nicolas	Oizumi	40206 Victory	Canyon Country	CA - California	91346	(661)-245 8814
04	Jason	Gero	22590 San F	Saugus	CA - California	91350	(661)-315 0887

Notice that in the center of the window is a list of all the drivers that have been entered into EZ Maintenance so far:

Driver No.	First Name	Last Name	Address	City	State	Zip Code	Phone
01	Eric	Sim	23658 Apple	Saugus	CA - California	91390	(661)-286 0046
02	Adam	Kane	50886 Ridge	Valencia	CA - California	91350	(661)-286 0021
03	Nicolas	Oizumi	40206 Victory	Canyon Country	CA - California	91346	(661)-245 8815
04	Jason	Gero	22590 San F	Saugus	CA - California	91350	(661)-315 0897

Each driver entered into EZ Maintenance has their own unique internal identification number that you choose when you enter them into the program. If you want to search for a particular driver in the list and you know their driver number, you can use the search box in the upper-right hand corner of the window:

Driver No.:

Click in the box and type the driver number for the driver whom you want to search for, and then hit the return key. If a driver with that number exists in EZ Maintenance, then it will be selected from the list below.

Notice that there are also some buttons at the bottom of the window: the |<, >, >| buttons help you scroll through the list of drivers. The |< and >| buttons take you to the very beginning and very end of the list respectively, while the < and > buttons move you backward and forward one driver respectively.

The remaining buttons are:

- **Print:** Clicking on the **Print** button will print out a list of drivers and the licenses which each one holds.
- **New Driver:** Clicking on the **New Driver** button allows you to enter a new driver into EZ Maintenance. This is explained in depth further down in this section.
- **Edit:** You can use the **Edit** button to change the information for an existing driver. Select the driver from the list which you want to edit by clicking on it, and then click on the **Edit** button. This is explained in detail further down in this section.
- **Delete:** You can use the **Delete** button to delete an existing driver. Select the driver from the list which you want to delete by clicking on it, and then click on the **Delete** button.
- **Close:** Click on the **Close** button to exit from this section of the program and return to the EZ Maintenance main menu.

Creating a New Driver

As described earlier, you can use the **New Driver** button to create a new driver in EZ Maintenance. Clicking on this button opens up the **Driver Information** window where you enter the information for the new driver:

The screenshot shows a window titled "Driver Information" with the following fields and sections:

- Driver No.:** A text input field for an alphanumeric ID number.
- First Name, Last Name, Phone:** Text input fields for personal information.
- SSN/ID, Date of Birth, Date of Hire:** Text input fields for identification and dates.
- Address:** A large text area for the driver's address.
- City, State/Province, Zip/Postal Code, Country:** Text input fields, with State/Province being a dropdown menu.
- Licenses and Incidents:** A tabbed section with "Licenses" selected, containing a table with columns: License Name, License No., ExpirationDate, and State. Below the table are "New License" and "Delete License" buttons.
- Buttons:** "OK", "Print", and "Cancel" buttons at the bottom.

In the upper right hand corner of the window there is a data field called **Driver No.**. This is where you enter the alphanumeric ID number which you use to track this driver internally and which will be used to identify this driver in EZ Maintenance. Click on the box to place the cursor within it and then type the ID number you'd like to use.

The remaining fields in the upper half of the window are used to record personal information about the driver: **First Name, Last Name, Phone, SSN/ID, Date of Birth, Date of Hire, Address, City, State/Province, Zip/Postal Code, and Country.** To enter information in all of these fields (except **State/Province**), click in the field and then type your entry. To choose the state in the **State/Province** drop-down box, click on the arrow on the right side of the box to expand the list of states and then click on the state you want to choose.

The lower half of the **Driver Information** window is where you enter the licenses for each driver and track any incidents or citations. Clicking on the **Licenses** tab displays a list of the licenses you have entered for this driver:

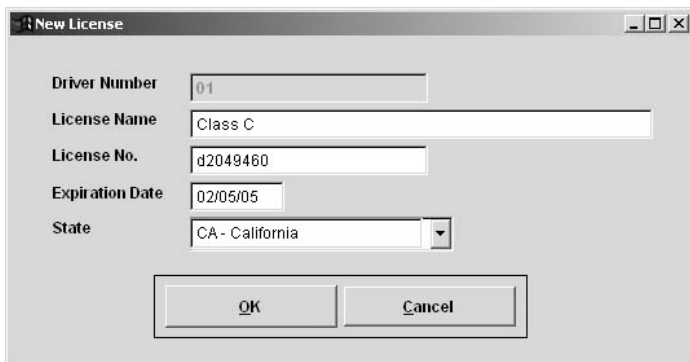
The screenshot shows the "Licenses" tab with the following table data:

License Name	License No.	ExpirationDate	State
Class C	d2049460	02/05/05	CA - California
Class M1	d2049460	02/05/05	CA - California

Buttons for "New License" and "Delete License" are visible to the right of the table.

For each license listed the name/type of the license is shown (**License Name**), the license number (**License No.**), the expiration date of the license (**ExpirationDate**), and the state in which the license is valid (**State**).

To add a new license to the list, click on the **New License** button. This will open up a window into which you enter the information for the new license:



The 'New License' dialog box contains the following fields and values:

- Driver Number: 01
- License Name: Class C
- License No.: d2049460
- Expiration Date: 02/05/05
- State: CA - California

Buttons: OK, Cancel

The first field you see at the top of the window is the **Driver Number** field which displays the ID number of the driver for which this license is being created. The other fields (into which you must enter information) are:

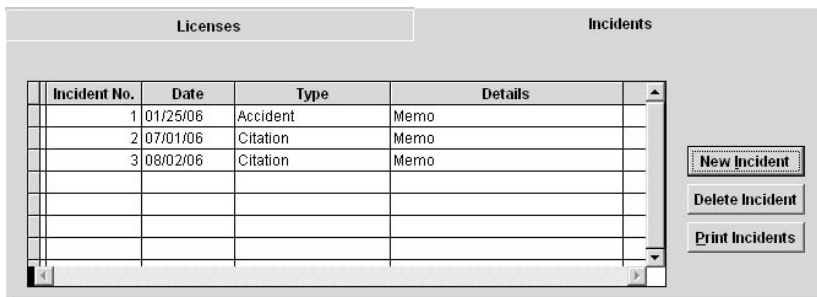
- **License Name:** This is the name or type of the license. This should tell you, for example, whether this license is issued for driving a passenger car, motorcycle, or large truck. Click in the box and then type the license name.
- **License No.:** This is the number of the license. Click in the box and type the license number.
- **Expiration Date:** This is the date on which the license expires. Click in the box and type the date in the format mm/dd/yyyy.
- **State:** This is the state in which the license was issued. To choose the state, click on the arrow on the right side of the box to expand the list of states and then click on the state you want to choose.

When you have finished entering all of the information for the new license, click on the **OK** button to add it to the list. If you have changed your mind and do not want to add the new license, click on the **Cancel** button.

You can also delete existing licenses by using the **Delete License** button. Just select the license you want to delete by clicking on it and then click on the **Delete License** button to delete it.

If you want to change the information for an existing license, just click on the cell in the table containing the information you want to edit and then type to make your changes.

Clicking on the **Incidents** tab displays the list of incidents for this driver:



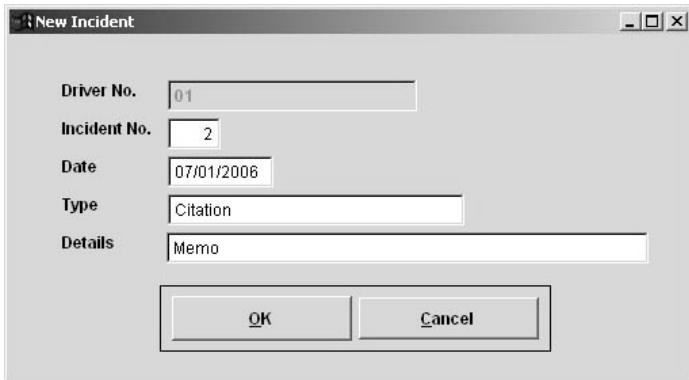
Incident No.	Date	Type	Details
1	01/25/06	Accident	Memo
2	07/01/06	Citation	Memo
3	08/02/06	Citation	Memo

Buttons: New Incident, Delete Incident, Print Incidents

For each incident listed there is an incident number (**Incident No.**), the date on which the incident occurred (**Date**), the type of incident (**Type**), and a description for the incident (**Details**).

In the cells under the **Details** column there will be either “memo” or “Memo”; if the latter is shown, that means a description has been added for this incident, and if the former is shown, that means no description has been added yet. To view or edit the description, double click on the cell. This will pop up a small window into which you can type a description. Click the **Close** button when finished.

To add a new incident to the list, click on the **New Incident** button. This will open up a window into which you enter the information for the new license:



The image shows a dialog box titled "New Incident". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The dialog contains five text input fields, each with a label to its left: "Driver No." (containing "01"), "Incident No." (containing "2"), "Date" (containing "07/01/2006"), "Type" (containing "Citation"), and "Details" (containing "Memo"). At the bottom of the dialog are two buttons: "OK" and "Cancel".

The first field you see at the top of the window is the **Driver Number** field which displays the ID number of the driver for which this incident is being recorded. The other fields (into which you must enter information) are:

- **Incident No.:** This is an ID number you choose to identify this incident. Click in the box and type the incident number you want.
- **Date:** This is the date on which the incident occurred. Click in the box and type the date of the incident in the format mm/dd/yyyy.
- **Type:** This is the type of incident which occurred. Click in the box and type the type of the incident.
- **Details:** To add a description of this incident, you must double-click on the word “memo” here. This will pop up a small window into which you can type a description. Click the **Close** button when finished.

When you have finished entering all of the information for the incident, click on the **OK** button to add it to the list. If you have changed your mind and do not want to add the new incident, click on the **Cancel** button.

You can also delete incidents by using the **Delete Incident** button. Just select the incident you want to delete by clicking on it and then click on the **Delete Incident** button to delete it.

Clicking on the **Print Incidents** button

If you want to change the information for an existing incident, just click on the cell in the table containing the information you want to edit and then type to make your changes. As mentioned earlier, if you want to edit the description, you must double click on the word “Memo”.

Lastly, at the bottom of the **Driver Information** window there are three buttons called **OK**, **Print**, and **Cancel**. Click on the **Print** button to print a report that shows information for the driver as well as the licenses they own. Click on the **OK** button when you have finished entering all of the information for the new driver and want to save it. Click on the **Cancel** button if you have changed your mind and do not want to add the new driver.

Editing an Existing Driver

To change the information for an existing driver, use the **Edit** button on the **Drivers** window (as discussed earlier in this section). Click on the driver you want to edit to select it and then click on the **Edit** button. This will open the **Driver Information** window:

The screenshot shows the 'Driver Information' window with the following data:

Driver No.	First Name	Last Name	Phone
01	Eric	Sim	(661)286-0046

Additional fields include SSN/ID, Address (23658 Apple Tree Pl., Saugus Ca., 91390), City (Saugus), State Province (CA - California), Zip Postal Code (91390), Date of Birth (03/24/1984), Date of Hire (04/01/2004), and Country (US).

The Licenses table is as follows:

License Name	License No.	ExpirationDate	State
Class C	d2049460	02/05/05	CA - California
Class M1	d2049460	02/05/05	CA - California

Buttons at the bottom include OK, Print, and Cancel. On the right side of the Licenses table, there are 'New License' and 'Delete License' buttons.

This window functions similarly to the window where you enter a new driver.

When you have finished making any changes you want to make, then click on the **OK** button to save your changes. If you have changed your mind and do not want to save your changes, then click on the **Cancel** button to discard any changes you have made and return to the list of drivers.

Expiring Drivers' Licenses Report

EZ Maintenance has a feature which lets you print a report that shows all of the drivers licenses for drivers which you have entered into EZ Maintenance which are expiring in a number of days that you specify. To use this feature click on the **Expiring Drivers Licenses** button on the EZ Maintenance main menu. This will open up a window where you can print this report:

As stated earlier, this feature of the program lets you print a report that shows all of the drivers licenses which are expiring within 'x' number of days. In the box in the center of the field, you would click in that box and type that value 'x' (the number of days). After you have typed that value, then click on the **OK** button to print the report, or click on

The 'Expiring Licenses' window displays the following information:

Lead Time: (Days)

Buttons: OK, Close

the **Cancel** button if you have changed your mind and do not want to print the report.

Expiring Vehicle Licenses Report

EZ Maintenance has a feature which lets you print a report that shows all of the vehicle licenses (i.e. registration) for vehicles which you have entered into EZ Maintenance which are expiring in a number of days that you specify. To use this feature click on the **Expiring Vehicle Licenses** button on the EZ Maintenance main menu. This will open up a window where you can print this report:

As stated earlier, this feature of the program lets you print a report that shows all of the vehicle licenses which are expiring within 'x' number of days. In the box in the center of the field, you would click in that box and type that value 'x' (the number of days). After you have typed that value, then click on the **OK** button to print the report, or click on the **Cancel** button if you have changed your mind and do not want to print the report.



CHAPTER 6 – INVENTORY & PURCHASING MODULE

The Inventory Module of EZ Maintenance lets you track and control your parts and materials inventory, create requests for bid and create purchase orders. To access the Inventory Module, click on the **Inventory & Purchasing** button on the EZ Maintenance main menu. This will open up a window containing a menu with seven buttons representing the actions you can perform within this section of the program plus a **Close** button which you can click on to return to the EZ Maintenance main menu.

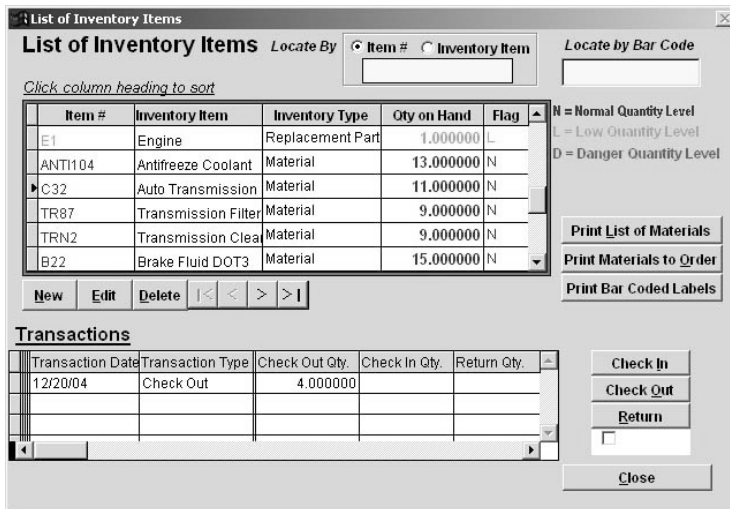
As mentioned before, the seven buttons here all correspond with some action you can perform within this section of the program:

- **Inventory** button: Clicking on the **Inventory** button takes you to a section of the program where you can enter new inventory items into EZ Maintenance for tracking, edit existing inventory items, and check items in and out of your inventory. See further down in this chapter for the topic “Materials and Parts Inventory” for in-depth information.
- **Req. For Bid**: Clicking on the **Req. For Bid** button takes you to a section of the program where you can create requests for bid. See further down in this chapter for the topic “Requests for Bid” for in-depth information.
- **Purchase Order**: Clicking on the **Purchase Order** button takes you to a section of the program where you can create purchase orders. See further down in this chapter for the topic “Purchase Orders” for in-depth information.
- **Receiving**: Clicking on the **Receiving** button takes you to a section of the program where you can receive materials against the purchase orders you’ve created. See further down in this chapter for the topic “Receiving Inventory” for in-depth information.
- **Vendor**: Clicking on the **Vendor** button takes you to a section of the program where you can enter the vendors from whom you purchase parts and materials (who can then be sent the purchase orders you create). See further down in this chapter for the topic “Vendors” for in-depth information.
- **Terms**: Clicking on the **Terms** button takes you to a section of the program where you can enter commonly used terms that specify arrangements you and your vendors agree upon when doing business. See further down in this chapter for the topic “Terms” for in-depth information.
- **Preferred Status**: Clicking on the **Preferred Status** button takes you to a section of the program where you can enter ratings you use to describe your vendors. See further down in this chapter for the topic “Preferred Status (Vendor Ratings)” for in-depth information.



Materials and Parts Inventory

Clicking on the **Inventory** button takes you to the **List of Inventory Items** window where you can enter parts and materials that you use during equipment and vehicle maintenance:



Sorting and Searching Through Inventory

In the **List of Inventory Items** window you can see a complete list of inventory items that you are currently tracking:

Item #	Inventory Item	Inventory Type	Qty on Hand	Flag
54	ForkLift Palette Blad	Replacement Part	4.000000	L
CLEAN22	Engine and Brake S	Material	15.000000	N
Pro589	5-Gallon Propane T	Material	5.000000	N
O100	Heavy Oil	Material	15.000000	L
L100	Spray Lubricant	Material	8.000000	N
C100	Degreasing Agent	Material	5.000000	N

Use the scroll bar to the right of the list to scroll through the complete list of items. You can also click on the column headers **Item #**, **Inventory Item**, **Inventory Type**, **Qty on Hand**, and **Flag** to sort the list accordingly.

The **List of Inventory Items** window also contains a search feature near the top of the window:



You can search by either by **Item #** or the name of the inventory item. Just type an item # or an item name into the yellow-colored box and then click one of the two circles called **Item #** and **Inventory Item** to search by item # or item name respectively. The item which you are searching for will then be selected in the list.

There is also a **Locate by Barcode** feature at the top-right corner of the window:



If the item which you are trying to locate has a corresponding barcode printed, you can search for it by clicking on the yellow-colored box and then “swiping” the barcode with your barcode scanner. The item which you are searching for will then be selected in the list.

Checking In, Checking Out, and Returning Inventory

You can check in newly arrived stock, check out stock, and return unused items into your inventory from the **List of Inventory Items** window.

To check in stock, select one of the inventory items in the list by clicking on it with the mouse. Then click on the **Check In** button. A window will pop up requesting you to enter some information:

A screenshot of a software dialog box titled "Inventory Item Check In". The dialog box has a title bar with a close button (X) in the top right corner. The main content area is divided into several sections. The top section is a table with the following data: Inventory Item: B22, Cost: \$6.000000, Name: Brake Fluid DOT3, Minimum Level: 5.0, Unit: Quarts, Maximum Level: 20.0, Manufacturer: (empty), Reorder Quantity: 10.0, Vendor: Napa, Inventory Type: Material, Date: 12/14/2004, ID Code 1: B22, ID Code 2: (empty), Quantity on Hand: 15.0, Warehouse Location: LA, Long Description: (empty). Below this table are several input fields: Transaction Type (set to "Check In"), Person (set to "Manager"), Warehouse Loc (set to "LA"), Check In Quantity (set to "30.0"), Transaction Date (set to "02/02/2007"), and Expiration Date (set to "02/02/2008"). At the bottom of the dialog box are two buttons: "OK" and "Cancel".

At the bottom of the window, enter the quantity you want to check in by clicking on the box named **Check In Quantity** and typing the amount you want to check in. Also, enter the date on which the items were actually put into the physical stock in the **Transaction Date** box. You can also enter where you will be stocking these items and, if needed, their expiration date in the **Warehouse Loc** and **Expiration Date** boxes respectively. When you are finished, click **OK** to check in the items or click **Cancel** to abort and not check in the items.

To check out stock select one of the inventory items in the list by clicking on it with the mouse. Then click on the **Check Out** button. A window will pop up requesting you to enter some information:

Inventory Item Check Out

Inventory Item:	C101	Cost:	\$25.000000
Name:	Etching Acid	Minimum Level:	50.0
Unit:	Ounces	Maximum Level:	80.0
Manufacturer:	Chem Labs West	Reorder Quantity:	25.0
Vendor:	Napa	Inventory Type:	Material
Date:	12/15/2004	ID Code 1:	
Quantity on Hand:	35.0	ID Code 2:	
		Warehouse Location:	
		Long Description:	concentrated Muriatic acid

Transaction Type: Person:

Warehouse Loc: Transaction Date:

Check Out Quantity:

Enter the quantity you want to check out by clicking on the box named **Check Out Quantity** and typing the amount you want to check out. Also, enter the date on which the items were actually taken out of your physical stock in the **Transaction Date** box. You can also enter the location of these items into the **Warehouse Loc** box. When you are finished, click **OK** to check in the items or click **Cancel** to abort and not check out the items.

To return unused stock back into the inventory select one of the inventory items in the list on the **List of Inventory Items** window by clicking on it with the mouse. Then click on the **Return** button. A window will pop up requesting you to enter some information:

Inventory Item Returned

Inventory Item:	C101	Cost:	\$25.000000
Name:	Etching Acid	Minimum Level:	50.0
Unit:	Ounces	Maximum Level:	80.0
Manufacturer:	Chem Labs West	Reorder Quantity:	25.0
Vendor:	Napa	Inventory Type:	Material
Date:	12/15/2004	ID Code 1:	
Quantity on Hand:	35.0	ID Code 2:	
		Warehouse Location:	
		Long Description:	concentrated Muriatic acid

Transaction Type: Person:

Quantity Returned: Transaction Date:

Enter the quantity you want to return by clicking on the box named **Return Quantity** and typing the amount you want to check out. Also, enter the date on which the items were actually returned to your physical stock in the **Transaction Date** box. When you are finished, click **OK** to return the items or click **Cancel** to abort and not return the items.

Please note that if you are checking in new inventory against a purchase order created in EZ Maintenance, it is recommended to check in items using the **Receiving** section of the Inventory Module (see further down in this chapter for the topic “Receiving” for more information). There you can receive the items against the purchase order.

Adding, Changing, and Deleting Inventory Items

From the **List of Inventory Items** window, the **New** button allows you to add a new kind of item to the inventory. Clicking on the **New** button opens up the **New Inventory** window where you can enter information about the new inventory item:

The screenshot shows a window titled "New Inventory" with a sub-header "New Inventory Information". The form contains the following fields:

- Item Number: [Text Box]
- Item Name/Description: [Text Box]
- Date: 02/02/2007
- Preferred Vendor: [Dropdown Menu]
- Manufacturer: [Text Box]
- Unit: [Text Box]
- Cost: [Text Box]
- % Markup: [Text Box]
- Price: [Text Box]
- Long Description: [Text Area]
- ID Code 1: [Text Box]
- ID Code 2: [Text Box]
- Inventory Type: [Dropdown Menu]
- Equip. or Vehicle: [Dropdown Menu, selected: Both]
- Quantity on Hand: [Text Box]
- Minimum Level: [Text Box]
- Maximum Level: [Text Box]
- Reorder Quantity: [Text Box]
- Warehouse Location: [Text Box]

Buttons at the bottom: Print, OK, Cancel.

You will notice that there are many different fields in this window into which you can enter information about the new inventory item. To enter data into each of these fields (except for **Preferred Vendor, Inventory Type, Equip. or Vehicle**), just click inside the box and type your entry. The **Preferred Vendor, Inventory Type, and Vehicle** fields are drop-down boxes; to enter data into these, click on the arrow on the right side of each to expand the list and then select your desired entry. The table below summarizes the meaning of each of these data items:

Item Number: This is a unique code that identifies the item. Although you can enter any characters into this field, it is recommended that you choose a brief code that consists of only letters, digits, and underscores.

Name/Description: Enter a name or a short description of the item here.

Date: Enter the date on which tracking for this item began.

Preferred Vendor: From the drop-down box, select the vendor from whom you prefer to order this item. For a vendor to be a selection here, you must have entered them into the Vendors section of EZ Maintenance.

Manufacturer: Enter the manufacturer of the item you are entering.

Unit: Enter the name of the unit which you are using to measure the quantity of this item (e.g. "gallons", "bundles").

Cost: Enter the cost per unit for this item.

% Markup: If you sell items directly out of your inventory, then this is the extra percentage you charge the customer.

Price: This is the price of the item plus the markup percentage, the full price you will charge a customer if you sell them the item directly from your inventory.

ID Code 1: If you have another ID code by which you track an inventory item, enter it here.

ID Code 2: If you have another ID code by which you track an inventory item, enter it here.

Inventory Type: From the drop-down box, select whether the item is a material, a part, or neither.

Equip. or Vehicle: Select whether the inventory item is used in only equipment maintenance, only vehicle maintenance, or whether it is used in both.

Quantity on Hand: Enter the quantity of the item you currently have in your actual inventory.

Minimum Level: Enter the lowest quantity of this item you want to allow. If the amount on hand of the inventory item goes below this level, it will be flagged as low on the inventory listing window.

Maximum Level: Enter the highest quantity of this item you want to allow. If you create a purchase order in which you order an amount of this item that would cause it to go above the maximum level, you will be warned that you are ordering too many.

Reorder Quantity: Enter the quantity in which you want new orders of this item to be made. When you are creating a purchase order containing this inventory item, the reorder quantity for it will be shown to guide the user placing the order.

Warehouse Location: Enter the actual physical location where this item is stored.

Long Description: A longer and more detailed explanation of the item.

Please note that if you have not yet entered any vendors into EZ Maintenance, no selections will appear in the **Preferred Vendor** drop-down menu. See further down in this chapter for the topic “Vendors” for information on how to enter your materials and parts vendors into EZ Maintenance.

From this window you can also create a report containing all of the information fields about the inventory item by clicking on the **Print** button at the bottom of the window.

Once you are finished entering all of the information, click on the **OK** button to save your changes. If you have changed your mind and do not want to enter the inventory item, click on the **Cancel** button to abort.

The **Edit** button on the **List of Inventory Items** window allows you to change information for a particular inventory item. To edit an item, select the item you want to edit by clicking on the item in the list with your mouse to select it. Then click on the **Edit** button, which will open up the **Modify Inventory Information** window where you can change information about the inventory item:

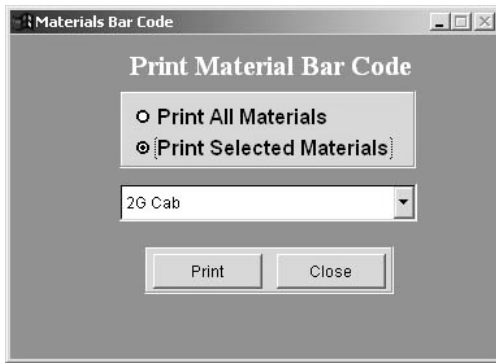
Modify Inventory Information				
Item Number:	C101	ID Code 1:	MUR-01	
Name/Description:	Etching Acid	ID Code 2:		
Date:	12/15/2004 <input type="checkbox"/> Active	Inventory Type:	Material	
Preferred Vendor:	Napa	Equip. or Vehicle:	Equipment	
Manufacturer:	Chem Labs West			
Unit:	Ounces	Quantity on Hand:	35.0	
Cost:	\$25.000000	Minimum Level:	50.0	
% Markup:	0.000000	Maximum Level:	80.0	
Price:	\$25.000000	Reorder Quantity:	25.0	
Long Description:	concentrated Muriatic acid for metal etching. 3.5 Molar Aquatic solution, PH: 0		Warehouse Location:	LA

This window is similar to the **New Inventory** window except for the fact that you cannot change the **Item Number** of the inventory item. Once you are finished making all of the desired changes, click on the **OK** button to save your changes. If you have changed your mind and do not want to save the changes you made, click on the **Cancel** button to abort.

The **Delete** button on the **List of Inventory Items** window allows you to remove an item from your inventory when you no longer want to track it. To delete an item, select the item you want to delete by clicking on the item in the list with your mouse to select it. Then click on the **Delete** button. A window will pop up prompting you to confirm that you really want to delete the item. Click on **Yes** to proceed and delete the item, or click on **No** to abort and not delete the item.

Printing Bar Coded Labels

The Inventory Module also allows you to print bar coded labels for your items. To print the labels, click on the **Print Bar Coded Labels** button on the **List of Inventory Items** window. This will pop up a small window:



Here you can choose whether you want to print a sheet of labels for all of your inventory items or for just one particular inventory item. To do this, click on one of the circles next to either **Print All Materials** or **Print Selected Materials**. If you chose **Print Selected Materials**, you must also choose the material for which you want to print a label from the drop-down box below. When you are ready to print, click on the **Print** button.

If you would like to make these labels stickers, the barcode printing feature is compatible with Avery sticker template 5161. Just insert the sticker template sheet into your printer and print the labels as you normally would.

When you are finished printing labels, click the **Close** button.

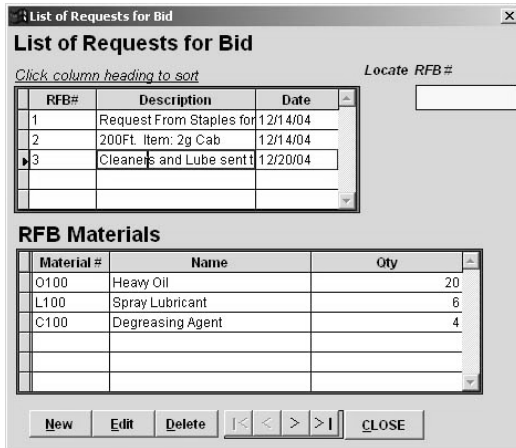
Other Printouts Available

From the **List of Inventory Items** window you can also print out a complete list of inventory items by clicking on the **Print List of Materials** button.

You can also print out a list of inventory items that have fallen to low levels by clicking on the **Print Materials to Order** button.

Requests for Bid

Clicking on the **Req. for Bid** button takes you to a section within the Inventory Module that lets you create requests for bid that you can print out and send to your parts and materials vendors. Once you click on the button, you are taken to the **List of Requests for Bid** window:



The first of the two tables in the **List of Requests for Bid** window is the list of requests that are currently open:

RFB#	Description	Date
1	Request From Staples for	12/14/04
2	200Ft. Item: 2g Cab	12/14/04
3	Cleaners and Lube sent t	12/20/04

You can sort this list by the purchase order number, the description of the purchase order, or by date by clicking on the column headers **RFB#**, **Description**, or **Date** respectively. If you click on one of the requests for bid using your mouse, the table below the requests for bid called **RFB Materials** will fill in with a summary of the specific materials for which you want a bid and their quantities:

Material #	Name	Qty
O100	Heavy Oil	20
L100	Spray Lubricant	6
C100	Degreasing Agent	4

You can also locate a request for bid quickly if you know its number. Just type the number of the request into the yellow-colored window in the upper-right hand corner of the window called **Locate RFB#** and then hit the return key. If it exists, the purchase order you are searching for will be selected.

When you are finished in the **List of Requests for Bid** window, click on the **CLOSE** button to exit.

Creating a New Request for Bid

To create a new request for bid, click on the **New** button at the **List of Requests for Bid** window. This will open the **New Request for Bid** window where you enter the information for your new request:

RFB#	Date	Send RFB?	Vendor ID	Vendor Name
1	02/05/2007	<input type="checkbox"/>	Staples	Staples
		<input type="checkbox"/>	Fry's	Fry's Electronics
		<input type="checkbox"/>	Autozone	Autozone
		<input type="checkbox"/>	Napa	Napa Auto Parts
		<input type="checkbox"/>	Bob's	Bob's machinery

Material #	Material Name	Qty	Delivery date

In the upper left hand corner of the window you will see three yellow-colored fields named **RFB#**, **Date** and **Description**. In the **RFB#** field, you will see a request for bid number that the program has automatically assigned to this request for bid. The **RFB#** number cannot be changed by the user. In the **Date** field you can put the date of the request for bid, and in the **Description** field you can type a description for the request.

In the upper right hand corner of the window you will see a list of the vendors you have entered into the program so far. This is where you choose the vendors to whom you want to send the request for bid. Under the column named **Send RFB?**, you will see some checkboxes, one for each vendor you have entered into the program. For each vendor to whom you want to send the request for bid, click on that vendor's corresponding checkbox.

At the bottom of the window you will see the list of materials for which you are requesting a bid:

Material #	Material Name	Qty	Delivery date
O100	Heavy Oil	20.000000	12/25/04
L100	Spray Lubricant	6.000000	12/25/04
C100	Degreasing Agent	4.000000	12/25/04

To add a new material to the list, click on the **New Detail** button. This will pop up the **New RFB Material Info.** window into which you input the information for the material you want to add to the list:

New RFB Material Info.

New Material Information

Req. #

Material #

Material Name

Quantity

Delivery Date

Long Description

There are six data fields on this window:

- **Req. #:** This is the number for the request for bid that the material you are entering is being added to. This number is filled in automatically and cannot be changed.
- **Material #:** This is where you select the material you want to add. Click on the arrow on the right of the box to expand the list, and then select the item number of the material you want to add.
- **Material Name:** This field is automatically filled in with the name of the material you selected in the **Material #** drop-down box.
- **Quantity:** This is where you enter the quantity of the material for which you are requesting a bid. Click in the box and type in the amount.
- **Delivery Date:** You can also specify when you would need to have this material delivered by in this field. Click in the box and type the date on which you need this material delivered.
- **Long Description:** In this box you can enter a long description for the material. Click in the box and type the long description.

Once you have entered all of the necessary information, click on the **OK** button to add the material to the list, or click the **Cancel** button to abort adding the material.

The **Edit Detail** button on the **New Request for Bid** window allows you to change information about a material listed on the bid request. To edit information for a material, click on one of the materials currently listed to select it and then click on the **Edit Detail** button. This will pop up the **Modify RFB Item Info.** window where you can change the information for the material:

Modify RFB Item Info.

Modify Material Info.

Req. #

Material #

Material Name

Quantity

Delivery Date

Long Description

This window works similarly to the window where you enter a new material (see further up in this section). When you have made all of the desired changes, click on the **OK** button to save your changes. Click on the **Cancel** button to abort editing the item and abandon any changes you made.

The **Delete Material** button on the **New Request for Bid** window lets you delete a material from the request for bid. To delete a material, click on one of the materials currently listed to select it and then click on the **Delete Material** button.

To print the request for bid, click on the **Print RFB** button. This will print one copy of the request for bid for each vendor that you selected.

When you are finished entering information for the request for bid, click on the **OK** button to save your changes. Click on the **Cancel** button to abort creating the item.

Editing or Deleting a Request for Bid

You can edit a request for bid at the **List of Requests for Bid** window by clicking on one of the existing requests for bid with your mouse to select it and then clicking on the **Edit** button. This will open up the **Modify Request for Bid** window:

Modify Request for Bid

Request For Bid (Edit Screen)

RFB# 3	Date 12/20/2004
------------------	---------------------------

Description
Cleaners and Lube sent to Napa and Autozone

Send RFB?	Vendor ID	Vendor Name
<input type="checkbox"/>	Staples	Staples
<input type="checkbox"/>	Fry's	Fry's Electronics
<input checked="" type="checkbox"/>	Autozone	Autozone
<input checked="" type="checkbox"/>	Napa	Napa Auto Parts
<input checked="" type="checkbox"/>	Bob's	Bob's machinery

Material #	Material Name	Qty	Delivery date
O100	Heavy Oil	20.000000	12/25/04
L100	Spray Lubricant	6.000000	12/25/04
C100	Degreasing Agent	4.000000	12/25/04

This window functions the same as the **New Request for Bid** window. When you are finished making the desired changes, click **OK** to accept your changes. If you've changed your mind and do not want to save the changes you've made, click on the **Cancel** button to abort and abandon any changes you've made.

You can delete a request for bid at the **List of Request for Bid** window by clicking on one of the existing requests for bid with your mouse to select it and then clicking on the **Delete** button. A window will pop up confirming that you really want to delete the request; click **Yes** to confirm and proceed with deleting it, or click **No** to abort and not delete the request for bid.

Purchase Orders

Clicking on the **Purchase Order** button takes you to a section within the Inventory Module that lets you create purchase orders that you can print out and send to your parts and materials vendors:

Purchase Order list

List of Purchase Orders

Locate By P.O.# Vendor ID

Click column heading to sort

PO#	Vendor ID	PO Date
1	Bob's	12/14/04
2	Fry's	12/14/04
3	Napa	12/20/04

Enter Delivery Date range

Start Date

End Date

Purchase Order Materials

Material #	Material Name	Quantity
C100	Degreasing Agent	4
C101	Etching Acid	15
L100	Spray Lubricant	5

In the **Purchase Order List** window, you can see the list of current purchase orders, and below that you can see the list of materials to order which are contained in a purchase order. If you select a purchase order from the list by clicking on it, the bottom of the two tables show will be updated with the list of materials in the purchase order you selected:

You can locate a purchase order quickly if you know its number or ID of the vendor from whom you're ordering. Just click on the yellow-colored box in the upper right hand corner of the window and then type the purchase order number or vendor ID. Then click on one of the small circles called **P.O.#** or **Vendor ID**. If it exists, the purchase order you are searching for will be selected.

You can also print a report showing all of the purchase orders for orders to be delivered within a certain date range. In the middle of the right part of the **Purchase Order List** window there is a box labeled **Enter Delivery Date Range**. Click on the box called **Start Date** and type in the lower end of the date range in which you want to search. Then click on the box called **End Date** and type the upper end of the date range in which you want to search. Then click on the **PRINT** button to print the report.

You can print a report showing all of the currently open purchase orders by clicking on the **Report** button at the bottom of the window.

When you are finished in the **Purchase Order List** window, click on the **CLOSE** button to exit.

Creating and Printing a New Purchase Order

To create a new purchase order, click on the **New** button on the **Purchase Order List** window. This will open the **New Purchase Order** window where you can enter information for the purchase order you want to create:

Material#	Material Name	Quantity Ordered	Price	Extended Price

Along the top of the **New Purchase Order** window and to the left there is a box called **PO #** that contains the number by which the purchase order is referred. This number is automatically chosen by EZ Maintenance and cannot be edited; purchase order numbers are chosen in sequence and each purchase order has a unique number.

Further to the right there is a box which you can check by clicking on it called **Closed?**. When you wish to close this purchase order this box must be checked. Further again to the right is another box called **PO Date**. EZ Maintenance automatically puts the current date into this box, although you may edit this date by clicking in the box with your mouse and then typing in the desired date.

You must also select the vendor to whom you are sending the purchase order. This is done at the left-hand side of the **New Purchase Order** window:

To choose a vendor, select one of the vendor IDs from the drop-down box called **Vendor ID**. The rest of the contact information for that vendor will automatically fill in below. You can also select the terms for payment from the drop-down box called **Terms** if you have a special arrangement with the vendor you selected. The **Terms** drop-down box will be empty unless you have entered terms in the **Terms** section of the Inventory module (see further down in this chapter for the topic “Terms” for more information). To the right of the section where you enter the vendor contact information is another section containing two tabs called **Contact Info** and **Order Totals**:

Clicking on the **Contact Info** tab will open up a section where you can enter the contact details of whom the vendor should contact about the order as well as the delivery date of the purchase order and a line to enter the person by whom this purchase order was created. Click on any of these fields with your mouse and type to enter or edit information contained in them.

Clicking on the **Order Totals** tab will open up a section with two fields called **FOB** and **Order Total**. The **Order Totals** field is filled in automatically with the total cost of the order.

At the bottom of the **New Purchase Order** there is a listing of all of the materials which you are ordering:

	Material#	Material Name	Quantity Ordered	Price	Extended Price	Inventory D
▶	C100	Degreasing Agent	4.000000	12.00	48.00	/ /
	C101	Etching Acid	15.000000	25.00	375.00	/ /
	L100	Spray Lubricant	5.000000	3.50	17.50	/ /

To enter a new material into the purchase order, click on the **New Detail** button at the bottom of the window. This will pop up the **New Purchase Order Material** window where you enter the information about the material you want to add:

There are several data fields in the **New Purchase Order Material** window:

- **PO No.:** This is the number of the purchase order to which this material is being added. This number is filled in automatically and cannot be edited.
- **Material No.:** Here you select the material you want to add to the purchase order by selecting it's corresponding material number from the drop-down list. Click on the arrow on the right side of the box to expand the list of material numbers and then click on the material number you wish to select.
- **Material Name:** This field fills in automatically with the name of the material whose material number you selected in the **Material No.** field. You can also edit the material name if necessary by clicking in the box with your mouse and then typing.
- **Reorder Quantity:** This field is automatically filled in with the recommended re-order quantity for the inventory item you wish to order.
- **Quantity Ordered:** This is where you enter the quantity of the item which you want to order. Click in the box and type the quantity you wish to order from the vendor.
- **Unit Price:** This is where you enter the price per unit which you and the vendor agreed upon. Click in the box and type the unit price at which you are ordering the material.
- **Extended Price:** This field is automatically filled in with the unit price multiplied by the total number of units being ordered.
- **Quantity Received:** This is the total number of units that have been received against the purchase order so far.
- **Quantity Due:** This field is automatically filled in with the difference between the quantity ordered and the quantity received so far.
- **Promised Delivery Date:** This is the delivery date which the vendor provided you for delivery of the material. Click in the box and type the promised delivery date.
- **Delivery Date:** Enter the actual delivery date into this field. Click in the box and type the actual delivery date.
- **Long Description:** Enter a long description for the material you are adding to the purchase order.

The screenshot shows a dialog box titled "New Purchase Order Material". It contains the following fields and controls:

- PO No.:** A text box containing the number "3".
- Material No.:** A dropdown menu with a downward-pointing arrow.
- Material Name:** A text box.
- Reorder Quantity:** A text box.
- Quantity Ordered:** A text box.
- Unit Price:** A text box.
- Extended Price:** A text box.
- Quantity Received:** A text box.
- Quantity Due:** A text box.
- Promised Delivery Date:** A text box containing "??".
- Delivery Date:** A text box containing "??".
- Long Description:** A larger text area.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

When you are finished entering information for the material, click on the **OK** button to add the material to the purchase order. If you've changed your mind and you don't want to add the material, then click on **Cancel** to abort and discard any information you have entered.

To edit a material on a purchase order, select the material by clicking on it and then clicking on the **Edit** button. This will pop up the **Modify Purchase Order Material** window which functions like the **New Purchase Order Material** window described above. When you are finished editing the material, click on the **OK** button to accept and save your changes or click on **Cancel** to abort and discard any changes you have made.

To print out the actual purchase order, click on the **Print PO** button.

When you are finished entering all of the information into the purchase order, click on the **OK** button to save the purchase or click **Cancel** to abort creating the purchase order.

Editing a Purchase Order

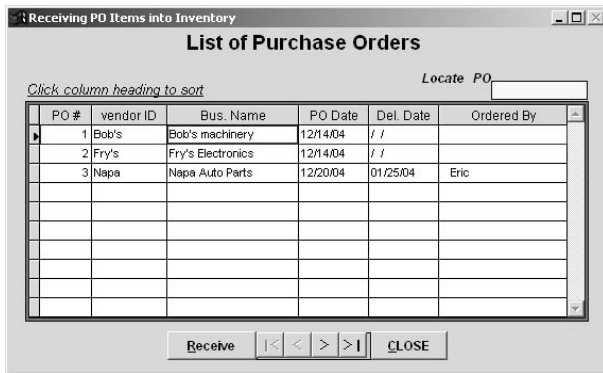
You can also edit existing purchase orders. At the **Purchase Order List** window, select a purchase order from the list by clicking on it and then click the **Edit** button. This will open up the **Modify Purchase Order** window where you can make changes the purchase order you selected:

Material#	Material Name	Quantity Ordered	Price	Extended Price	Ivery D
C100	Degreasing Agent	4.000000	12.00	48.00	/ /
C101	Etching Acid	15.000000	25.00	375.00	/ /
L100	Spray Lubricant	5.000000	3.50	17.50	/ /

When you are finished making changes to the purchase order, click on the **OK** button to save the changes you've made, or click the **Cancel** button to discard any changes you've made.

Receiving Inventory

Clicking on the **Receiving** button takes you to a section of the program that lets you receive inventory items that you have ordered from a vendor against your purchase orders. The main window of this section of EZ Maintenance is the **Receiving PO Items into Inventory** window:

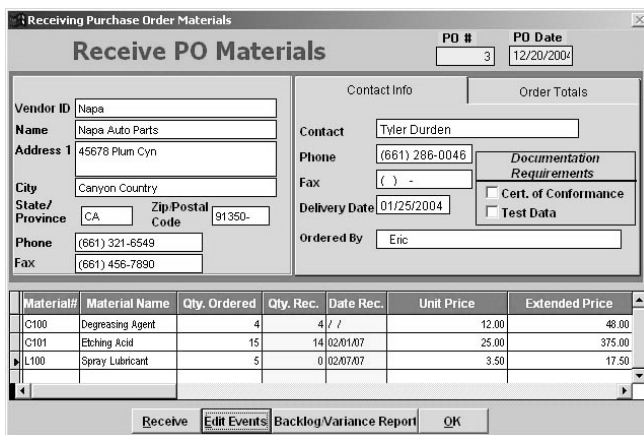


In this screen you will see a table containing a list of all of your currently open purchase orders. You can also locate a particular purchase order by clicking in the yellow-colored box at the top right hand corner of the screen called **Locate PO**, typing the number of the purchase order you are looking for, and then hitting the return key.

When you are finished receiving materials, you can click the **CLOSE** button to exit from the **Receiving** section.

Receiving Materials Against a Purchase Order

To receive materials against a particular purchase order, click on a purchase order from the list to select it, and then click on the **Receive** button. This will open the **Receiving Purchase Order Materials** window:



In the upper right hand corner of the screen there are two fields called **PO #** and **PO Date** which display the purchase order number and the date on which the purchase order was created respectively.

In the middle-left part of the screen is the contact information for the vendor. To the right of that is a section with two tabs called **Contact Info** and **Order Totals**. Clicking on the **Contact Info** tab will show you the contact info of the person whom the vendor was directed to contact regarding the purchase order. Clicking on the **Order Totals** tab shows **FOB** plus the grand total for the order.

At the bottom of the **Receiving Purchase Order Materials** window is a list showing all of the materials ordered in this purchase order:

Material#	Material Name	Qty. Ordered	Qty. Rec.	Date Rec.	Unit Price	Extended Price
C100	Degreasing Agent	4	4	/ /	12.00	48.00
C101	Etching Acid	15	14	02/01/07	25.00	375.00
L100	Spray Lubricant	5	0	02/07/07	3.50	17.50

To receive an item, select it from the list by clicking on it and then clicking on the **Receive** button. This will pop up the **Receiving PO Materials Into Inventory** window:

At the top of the window the **Material #**, **Description**, and the **Long Description** are shown for the material. The other three fields you must enter information into are:

- **Date Received:** This is the date on which the materials are being received. This field is automatically filled in with today's date, but you can edit the date by clicking inside the box and typing the desired date.
- **Enter Quantity Received:** This is the quantity that is being received. Click on the far left side of the box to place your cursor in it and type the amount being received.
- **Expiry Date:** Enter the expiration date for the materials being received into this field. Click in the box and type the expiration date.

If you want to print a sheet of bar coded labels for this item, click on the **Print Bar Coded Sticker** button. If you would like to make these labels stickers, the barcode printing feature is compatible with Avery sticker template 5161. Just insert the sticker template sheet into your printer and print the labels as you normally would.

When you are finished, click on the **Close** button to receive the item in the quantity you specified. To cancel without receiving any items, leave the **Enter Quantity Received** field blank and click **Close**.

The **Edit Events** button at the **Receiving Purchase Order Materials** window lets you view and edit all of the receiving events that have happened for a particular material on a purchase order. Clicking on the **Edit Events** button takes you to the **Receiving Material Inventory** window:

Receiving Material Inventory

RECEIVING EVENTS

Material # Material Name

Date	Quantity Received	
02/07/07	8	Add New Line
01/25/07	4	
02/01/07	2	

Receiving log

Date Range:

At the top of the window, in the **Material #** and **Material Name** fields you will see the catalog number and the name of the material you are receiving respectively. Below that you will see a list of all of the times on which materials were received against this purchase order:

Date	Quantity Received	
02/07/07	8	Add New Line
01/25/07	4	
02/01/07	2	

You can change the date and the quantity received for the events listed here. Each line on the list represents a time or event on which materials were received against the purchase order. To edit one of the events, just click on either the date or the quantity that was received and type your correction. You can also add a new event to the list by clicking on the **Add New Line** button on the right side of the window. Doing so will pop up a window into which you can enter the date of the receiving event and the quantity that was or is being received:

Receive P.O. Item

Quantity Left

Date

Quantity Received

Click on the **Date** box and type in the date on which the item was or is being received. Click on the **Quantity Received** box and type the quantity that is being received; make sure that the quantity being received is not greater than the quantity shown in the **Quantity Left** box (you cannot receive more materials than you ordered.) When you have finished, click on the **OK** button to add the event, or click **Cancel** if you have changed your mind and do not want to add a new event.

To delete a receiving event click on an event to select it and click the **Delete** button.

You can also print out a bar coded sticker for this item by clicking on the **Print Barcoded Sticker** button.

When you are finished editing receiving events, click on the **Close** button.

At the **Receiving Purchase Order Materials** window, there is also a button called **Backlog/Variance Report** which allows you to view a report which shows the difference between the quantity ordered and the quantity received against the purchase order for each of the materials on the purchase order.

Vendors

Clicking on the **Vendor** button takes you to a section of the program where you enter the vendors from whom you purchase parts and materials. When you create purchase orders and requests for bid, you will select whom to send them to from the list of vendors you input here. The main section of the **Vendor** section of EZ Maintenance is the **List of Vendors** window:

Vendor ID	Name	Phone
Staples	Staples	(555)-123 9876
Fry's	Fry's Electronics	(555)-987 1234
Autozone	Autozone	(661)-741 8529
Bob's	Bob's machinery	(555)-123 4567

In the center of the **List of Vendors** window there is the list of all of the vendors you've currently entered. Above that there is a search box labeled **Locate By**:

Vendor ID Name

You can search for a particular vendor by clicking on and typing either the vendor's ID number or their name into the yellow-colored box and then clicking on either of the circles called **Vendor ID** or **Name**. If the vendor has been entered into EZ Maintenance, it will be selected from the list.

The **New**, **Edit**, and **Delete** buttons allow you to enter new vendors into the program, change information for existing vendors, and delete vendors from the program respectively. Their functions are described below in this document.

Clicking on the **Vendor List** button prints out a list of the vendors you have currently entered into the program that shows their vendor ID, name, and phone number. Clicking on the **Vendor Labels** button prints out mailing labels for your vendors.

When you wish to exit the **Vendor** section of EZ Maintenance, click on the **Close** button.

Creating a New Vendor

To enter a new vendor into EZ Maintenance, click on the **New** button at the **List of Vendors** window. This will take you to the **New Vendor Information** window:

New Vendor	
Vendor ID	Name

Address		Contact Information			
Name	Title	Address	Phone		

Address: _____
City: _____
State/Province: _____
ZIP/Postal Code: _____
Country: _____
 US Address?
Phone: () - _____
Fax: () - _____
Email: _____
Terms: _____ Preferred Status: _____

Notes: _____

Buttons: Add, Edit, OK, Cancel, Print, Mailing Label

At the top of the window are two boxes named **Vendor ID** and **Name**. Click in these boxes and type the ID number and the name of the vendor respectively. These are required fields and must be filled in to save the new vendor you are entering.

At the left side of the window there are several fields that need to be filled in with the vendor's contact information:

- **Address:** This is where you enter the street address for the vendor. Click in the box and type in the address here.
- **City:** This is where you enter the city in which the vendor is located. Click in the box and type in the city here.
- **State / Province:** This is where you enter the state in which the vendor is located. Select a state from the drop-down box by clicking on the small arrow to the side to expand the list, and then clicking on one of the entries in the list. However, if you do not have the **US Address** checkbox checked, this will be a field that you can type an entry into.
- **ZIP / Postal:** This is where you enter the zip or postal code for the vendor. Click in the box and type in the zip or postal code here.
- **Country:** This is where you enter the country in which the vendor is located. Click in the box and type in the country here.

- **Phone:** This is where you enter the main contact phone number for the vendor. Click in the box and type in the phone number here. If you have the **US Address** checkbox checked, you are restricted to entering phone numbers of the format (xxx) xxx-xxxx where 'x' is a digit. If it is unchecked, you can enter the special characters '+' (plus sign), '-' (dash), and '.' (dot), and parentheses are not required.
- **Fax:** This is where you enter the main fax phone number for the vendor. Click in the box and type in the fax number here. If you have the **US Address** checkbox checked, you are restricted to entering fax numbers of the format (xxx) xxx-xxxx where 'x' is a digit. If it is unchecked, you can enter the special characters '+' (plus sign), '-' (dash), and '.' (dot), and parentheses are not required.
- **Email:** This is where you enter the main email for the vendor. Click in the box and type in the email here.

Address	89562 Tamarack Ln.
City	Lake Havasu City
State/Province	AZ
ZIP/Postal Code	48522-
Country	United States
	<input checked="" type="checkbox"/> US Address?
Phone	(555) 123-4567
Fax	(555) 987-6543
Email	sales@bobsmachinery.co
Terms	Preferred Status
3/10 Net 15	Good

There are also two other drop-down boxes called **Terms** and **Preferred Status**. If you have a special arrangement for payment and delivery with this vendor, select it from the **Terms** drop-down menu. Select the rating you have for this vendor from the **Preferred Status** drop-down menu.

To the right of the section of the **New Vendor Information** window where you enter the vendor's main contact information is a section where you can enter additional contacts for the vendor:

Contact Information			
Name	Title	Address	Phone
Joshua Steve	IT / Technical	89562 Tamar	(555)
▶ Ian Thomps	Sales	89562 Tamar	(552)
Rebecca Ora	Customer Re	30521 State	(553)

To add another contact to the list, click on the **Add** button. This will pop up a window into which you enter information for the new contact:

New Contact

New Contact Information

Vendor ID: Bob's

Name: Joshua Stevens

Title: IT / Technical Support

Address: 89562 Tamarack Ln.

Phone: (555)-123 4567

Email: josh@bobsmachinery.com

Other:

OK Cancel

Here you can enter: a name for the contact, their title, their address, their phone number, their email address, and additional information. Just click on the fields with your mouse and type in your entries. When you are finished entering information for the contact, click on the **OK** button to accept your entries. If you have changed your mind and do not want to add the contact, then click on the **Cancel** button.

You can also edit an existing contact by using the **Edit** button (to the right of the **Add** button). Just select the contact you want to edit from the list by clicking on it and then click on the **Edit** button.

At the bottom left hand corner of the **New Vendor Information** window is a large box called **Notes** where you can leave some notes about the vendor you are entering. Just click in the box and type any notes you'd like to leave about this vendor.

At the bottom right hand corner of the **New Vendor Information** window are four buttons: **OK**, **Cancel**, **Print**, and **Mailing Label**.

Clicking on the **Mailing Label** button will print out a sheet of mailing labels with the vendor's address on them. Clicking on the **Print** button will print out the vendor information along with all additional contacts for the vendor.

Click on the **OK** button when you are finished entering information for the Vendor. Click on the **Cancel** button if you have changed your mind and you do not want to enter the vendor.

Editing or Deleting Vendors

To edit the information for a vendor, select a vendor from the list at the **List of Vendors** window by clicking on it and then clicking on the **Edit** button. This will open up the **Modify Vendor Information** window:

Modify Vendor Information

Vendor ID: Bob's Name: Bob's machinery

Address

Address: 89562 Tamarack Ln.
City: Lake Havasu City
State/Province: AZ
ZIP/Postal Code: 48522-
Country: Us
 US Address?
Phone: (555) 123-4567
Fax: (555) 987-6543
Email:
Terms: Preferred Status
3/10 Net 15 Good

Contact Information

Name	Title	Address	Phone
Joshua Steve	IT / Technical	89562 Tamarack Ln.	(555) 123-4567
Ian Thompson	Sales	89562 Tamarack Ln.	(555) 123-4567
Rebecca Ora	Customer Representative	30521 State St.	(555) 123-4567

Buttons: Add, Edit, OK, Cancel, Print, Mailing Label

Notes: [Empty text area]

The **Modify Vendor Information** window functions much like the **New Vendor Information** window. When you are done making changes to the vendor you are editing, click on the **OK** button to save your changes. If you do not want to save your changes, click on the **Cancel** button to abort and discard any changes you've made.

You can delete vendors as well: select a vendor from the list at the **List of Vendors** window by clicking on it and then clicking on the **Delete** button. This will remove the vendor from EZ Maintenance.

Terms

The **Terms** section of EZ Maintenance is where you enter short descriptions of arrangements you have with your vendors for purchasing materials:

To make a new entry, click on the **New** button. This will pop up a window into which you will type your new terms. Click in the box and then type your entry. When you are finished, click on the **OK** button to save the new terms. If you have changed your mind and you do not want to enter it, then click **Cancel**.

To edit an existing entry, click on one of the terms in the list to select it and then click on the **Edit** button. This will pop up a window with a box containing the entry you want to edit. Click on the box and then type to make your changes. When you are finished, click on the **OK** button to accept and save your changes. Click on the **Cancel** button to abort and discard any changes you've made.

You can click on the **Print** button to print a report of all of the terms you currently have entered into EZ Maintenance.

Click on the **Close** button to exit the **Terms** section when you are finished.

Terms

Terms

- 2/10 Net 30
- 3/10 Net 15
- Due Upon Receipt

Buttons: New, Edit, Print, Close

Preferred Status (Vendor Ratings)

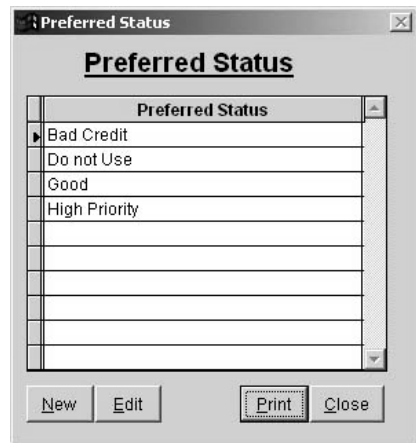
The **Preferred Status** section of EZ Maintenance is where you enter ratings you use to describe the vendors from whom you purchase materials and replacement parts.

To make a new entry, click on the **New** button. This will pop up a window into which you will type your new rating. Click in the box and then type your entry. When you are finished, click on the **OK** button to save the new rating. If you have changed your mind and you do not want to enter it, then click **Cancel**.

To edit an existing entry, click on one of the statuses in the list to select it and then click on the **Edit** button. This will pop up a window with a box containing the entry you want to edit. Click on the box and then type to make your changes. When you are finished, click on the **OK** button to accept and save your changes. Click on the **Cancel** button to abort and discard any changes you've made.

You can click on the **Print** button to print a report of all of the ratings you currently have entered into EZ Maintenance.

Click on the **Close** button to exit the **Preferred Status** section when you are finished.



CHAPTER 7 – ADMINISTRATIVE UTILITIES

EZ Maintenance includes some utilities that are represented by the five buttons just below the center of the main menu of the program:

These buttons can be summarized as follows:

- **Preferences:** Clicking on the **Preferences** button takes you to a section of the program where you can adjust certain aspects of how EZ Maintenance works to tailor it to your company's needs. See further down in this chapter for the topic "Setting Preferences" for in-depth information.
- **User Passwords:** Clicking on the **User Passwords** button takes you to a section of the program where you can add, change, or delete existing user login names and passwords for EZ Maintenance. See further down in this chapter for the topic "Password Maintenance" for in-depth information.
- **Import Data:** Clicking on the **Import Data** button takes you to a section of the program where you can quickly import information about your equipment, vehicles, inventory and other data in Excel spreadsheet form instead of entering all these items into EZ Maintenance manually. See further down in this chapter for the topic "Import Data Utility" for in-depth information.
- **Add User Licenses:** Clicking on the **Add User Licenses** button takes you to a section of the program where you can increase the number of users that can access EZ Maintenance over your network simultaneously. See further down in this chapter for the topic "Registering Additional User Licenses" for in-depth information.
- **About:** Clicking on the **About** button opens up a window that shows what version of EZ Maintenance you have (see further down for the topic "About").

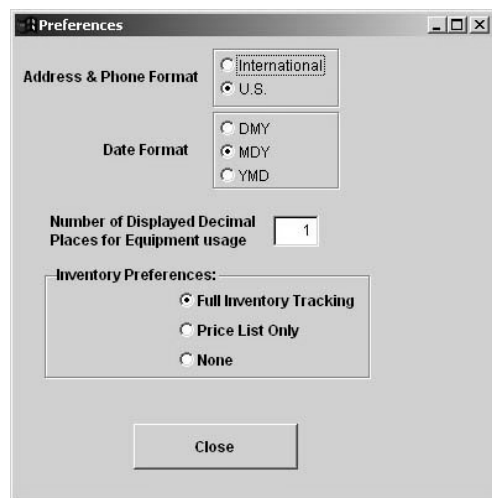


Setting Preferences

EZ Maintenance includes a section where you can adjust settings that affect how the program works to suit your company's needs. To access the "Preferences" section of EZ Maintenance, click on the **Preferences** button on the main menu of EZ Maintenance. This will open up the **Preferences** window:

There are four aspects of the program which you can adjust from this window:

- **Address & Phone Format:** Clicking on the **U.S.** circle restricts zip codes to the format xxxxx-xxxx and phone numbers to the format (xxx) xxx-xxxx, where x is a digit. Clicking on the **International** circle allows you to have zip codes with letters and phone numbers can include special characters such as "+" and ".".
- **Date Format:** Here you can choose in what format you want dates to be displayed throughout the application. Click on the **DMY** circle to display dates in the format day-month-year; click on the **MDY** circle to display dates in the format month-day-year; click on the **YMD** circle to display dates in the format year-month-day.
- **Number of Displayed Decimal Places for**



Equipment Usage: Here you can set the precision with which equipment usage is entered into the program and viewed. For example, entering "1" allows tenths of a unit to be entered; "2" allows hundredths of a unit to be entered, and etc. Click in the box and type in the desired precision.

- **Inventory Preferences:** This setting allows you to set whether you want full inventory control, whether you want to just track prices, or whether you want to disable the inventory section entirely; click on one of the circles called **Full Inventory Tracking**, **Price List Only**, or **None** respectively.

When you are finished setting your preferences, click on the **Close** button at the bottom of the window to return to the EZ Maintenance main menu.

Password Maintenance

The Password Maintenance section of EZ Maintenance is where you can create new user passwords and manage existing user passwords. You can enter this section of the application by clicking on the **User Passwords** button on the main menu of EZ Maintenance. This will open up the **Password Maintenance** window which contains a menu of buttons:

The functions of the buttons are as follows (all of these except the **Close** button are explained in depth further down in this section):

- **New:** Allows you to create a new login username and password.
- **Edit:** Allows you to change the access level for an existing password.
- **Change Password:** Allows you to change the password for a given user login username.
- **Delete:** Allows you to delete an existing login username and password so that it can no longer be used.
- **List:** Displays a summary of the existing login usernames and their corresponding passwords and access levels.
- **Close:** Click on the **Close** button to exit back to the EZ Maintenance main menu.



Creating a New Username and Password

Clicking on the **New** button on the **Password Maintenance** window opens up the **New User** window where you enter the information for the new login username and password you are creating:

First you must choose the username for the new user you are creating. Your username can contain any kind of characters and numbers, but it cannot contain a space. Click in the **User Name** box and type in the username you have chosen.

After you have chosen the username, then you must choose a password. Like the username, it can contain any kind of characters and number, but it also contain spaces. Click in the **Password** box and type in the password you have chosen. Then click in the **Verify Password** box and type the password again to verify it.

Lastly, you need to choose the type of access that this user has. This enables you to limit their access to certain parts of the program. To choose the access level, click on the arrow on the right side of the **Access Level** drop-down box to expand the list of user levels, and then click on the appropriate level. Here is a summary of what the different user types allow:

System Administrator	No Restrictions; access to all parts of the software.
Supervisor	Supervisors Cannot: <ul style="list-style-type: none"> ○ Edit User Passwords ○ Check In/Check Out Inventory
User	Users Cannot: <ul style="list-style-type: none"> ○ Enter, Change, or Delete Inventory Items ○ Users Inherit all Supervisor Restrictions

Once you have entered all of the information for your new user, then click on the **OK** button to add the new user. If you have changed your mind and you don't want to add a new user, then click on the **Cancel** button.

Changing a User's Access Level

Clicking on the **Edit** button on the **Password Maintenance** window opens up the **Edit Access Level** window where you can change the access level for a user:

The 'Edit Access Level' dialog box is shown with the following fields and controls:

- User Name:** A dropdown menu currently displaying 'Eric'.
- Password:** A text input field containing seven asterisks (*****).
- Access Level:** A dropdown menu currently displaying '3'.
- User Type:** A text input field containing 'System Administratc'.
- Buttons:** Three buttons at the bottom: 'Save', 'Cancel', and 'Close'.

First you must choose the user whose access level you want to change from the **User Name** drop-down menu. Click on the arrow on the right side of the box to expand the list of users that are currently entered into EZ Maintenance, and then click on the user whose access level you want to change. Then click in the **Password** box and type the password for that user.

Then choose the users new access level. To choose the access level, click on the arrow on the right side of the **Access Level** drop-down box to expand the list of user levels, and then click on the appropriate level. See further up in this section for an explanation of the different user levels.

Once you have chosen the new access level, then click on the **OK** button to add the new user. If you have changed your mind and you don't want to change the user's access level, then click on the **Cancel** button.

Changing a User's Password

Clicking on the **Change Password** button on the **Password Maintenance** window opens up the **Change Password** window where you can change the password for a user:

The 'Change Password' dialog box is shown with the following fields and controls:

- Username:** A dropdown menu currently displaying 'Eric'.
- Old Password:** A text input field containing seven asterisks (*****).
- New Password:** A text input field containing seven asterisks (*****).
- Confirm Password:** A text input field containing seven asterisks (*****).
- Buttons:** Two buttons at the bottom: 'Save' and 'Close'.

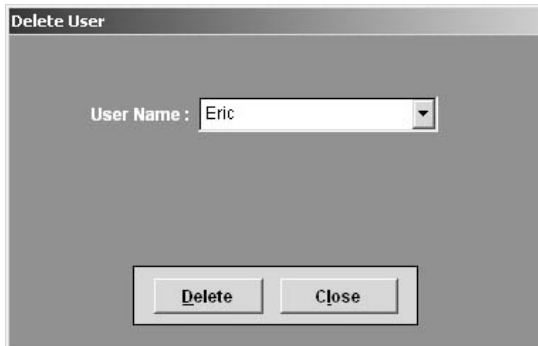
First you must choose the user whose password you want to change from the **Username** drop-down menu. Click on the arrow on the right side of the box to expand the list of users that are currently entered into EZ Maintenance, and then click on the user whose access level you want to change. Then click in the **Password** box and type the password for that user.

Next you must choose the new password for the user. The password can contain any kind of characters and numbers and spaces. Once you have decided upon a password, click in the **New Password** box and type in the new password. Then click in the **Confirm Password** box and type the password again to verify it.

Once you have entered the new password, click on the **Save** button to save your changes. If you have changed your mind and do not want to change the password, then click on the **Cancel** button.

Deleting a User

Clicking on the **Delete** button on the **Password Maintenance** window opens up the **Delete User** window where you can delete a user from the program so that they can no longer log in:



First you must choose the user whom you want to delete from the **User Name** drop-down menu. Click on the arrow on the right side of the box to expand the list of users that are currently entered into EZ Maintenance, and then click on the user whom you want to delete.

After you have selected the user whom you want to delete, then click on the **Delete** button at the bottom of the window. If you have changed your mind and do not want to delete a user, then click on the **Close** button instead.

Viewing a List of All Users

Clicking on the **List** button on the **Password Maintenance** window opens up the **Users List** window where you can view a list of all of the users currently entered into the program:

Users List				
Username	Password	Access Level	User Type	
Manager	start	3	System administrator	
Adam	sd9943	1	User	
Jason	greenvalley	2	Supervisor	
Eric	eslinkit	2	Supervisor	
Judith	sanchez	1	User	

Each row in the list represents a single user, and for each user the actual username is displayed (**Username**), the corresponding password (**Password**), and the access level (**Access Level**) and user type (**User Type**).

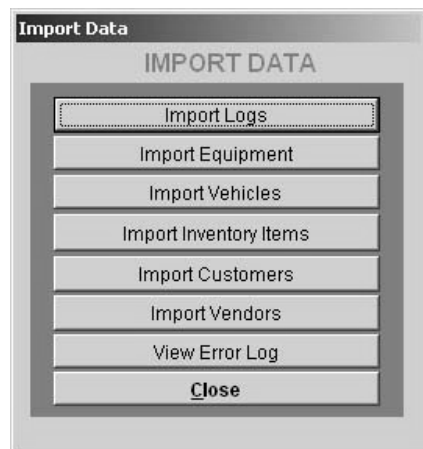
Clicking on the **Print** button at the bottom of the window will print out a report listing all of the users. When you are finished here, then click on the **Close** button.

Import Data Utility

EZ Maintenance has a Data Import Utility that allows you to quickly import information about your equipment, vehicles, inventory and other data in Excel spreadsheet form instead of entering all these items into EZ Maintenance manually. To access this feature of the software, click on the **Import Data** button on the EZ Maintenance main menu. This will open up a window with a menu of eight buttons:

The first six buttons represent kinds of data that you can import into EZ Maintenance:

- **Import Logs:** Clicking on the **Import Logs** button brings you to a section of the Import Utility where you can import usage logs for your equipment and vehicles into EZ Maintenance. See further down in this section for the sub topic “Importing Usage Logs” for in-depth information.
- **Import Equipment:** Clicking on the **Import Equipment** button brings you to a section of the Import Utility where you can import your equipment into EZ Maintenance. See further down in this section for the sub topic “Procedure for Importing Equipment Information” for in-depth information.
- **Import Vehicles:** Clicking on the **Import Vehicles** button brings you to a section of the Import Utility where you can import your vehicles into EZ Maintenance. See further down in this section for the sub topic “Procedure for Importing Vehicle Information” for in-depth information.
- **Import Inventory Items:** Clicking on the **Import Inventory Items** button brings you to a section of the Import Utility where you can import the materials and replacement parts from your inventory into EZ Maintenance. See further down in this section for the sub topic “Procedure for Importing Inventory Information” for in-depth information.



- **Import Customers:** Clicking on the **Import Customers** button brings you to a section of the Import Utility where you can import information on the customers from whom you maintain equipment and/or vehicles. See further down in this section for the sub topic “Procedure for Importing Customers” for in-depth information.
- **Import Vendors:** Clicking on the **Import Vendors** button brings you to a section of the Import Utility where you can import information on the vendors from whom you purchase materials and replacement parts into EZ Maintenance. See further down in this section for the sub topic “Procedure for Importing Vendor Information” for in-depth information.

Clicking on the **View Error Log** button (second from the bottom) allows you to check whether or not an attempt to import information into EZ Maintenance was successful or not. See further down for the sub topic “View Error Logs” for in-depth information.

Click on the **Close** button to return to the EZ Maintenance main menu.

If You Are Unable to Open the Import Utility

When you click on the **Import Data** button on the EZ Maintenance main menu, you may receive the following message:



If you receive this message, then your copy of the program does not include the import utility. To purchase the import utility, please contact your sales representative at Link It Software at (818) 574-3970.

Using the Excel File Templates

Included with the EZ Maintenance Import Utility are several Excel file templates in which the data you want to import into EZ Maintenance must be entered prior to running the import utility. These files are located in the folder in which you installed EZ Maintenance. This section describes the files and instructions for entering data into them.

Summary of Excel File Templates

The following table lists the filenames of the Excel File Templates along with their respective functions. **Please note:** it is not recommended that these filenames be modified by the user.

Filename	Contents
<i>“Equipment_Information.xls”</i>	Contains information for the pieces of equipment for which you would like to set up scheduled maintenance.
<i>“Vehicle_Information.xls”</i>	Contains information for the vehicles for which you would like to set up scheduled maintenance.
<i>“Inventory_Information.xls”</i>	Contains information about the items in your inventory.
<i>“Customer_Information.xls”</i>	Contains information about your customers.
<i>“Customer_Additional_Information.xls”</i>	Contains additional contact information for your customers.

"Vendor_Information.xls"	Contains information about the vendors from whom you order materials.
"Vendor_Additional_Information.xls"	Contains additional contact information for the vendors from whom you order materials.

Entering Data into the Excel File Templates

In the first row of each of the Excel file templates included with the import utility is a header describing the abbreviations which define what kind of data can be entered into a particular field. For example, if a column has the header "(max 50-C)", that means that only character (non-numeric) data will be accepted in that field and that a maximum of 50 characters is allowed. If data is not entered in the prescribed format, the EZ Maintenance import utility may not recognize the data correctly, so it is important that data be entered in the format indicated. Also, if you wish to delete an item from one of the Excel file templates, be sure that you delete the entire row and not just individual data items.

Importing Usage Logs

The EZ Maintenance import utility also allows importing of usage logs for equipment and vehicles. The following section will describe the procedure for accomplishing this as well as how to prepare the data for import.

Using the "Odometer.csv" File

Before you begin to import usage logs into EZ Maintenance, you must enter the information you desire to be imported into the file "Odometer.csv". This file can be edited using Excel and is located in the folder in which you installed EZ Maintenance. Information must be entered in the following format, with each record occupying a single row, and each piece of data, such as the date, occupying a single cell:

For Equipment:

Date [MM/DD/YYYY], Internal Control Number [I], Odometer Reading

For Vehicles:

Date [MM/DD/YYYY], Vehicle Number, Odometer Reading, State, Fuel Used

For example, if we logged in vehicle #406 in California on June 3rd, 2005 with an odometer reading of 131,320 miles and having used 15 gallons of fuel since the last recorded log: it would be inputted into the "Odometer.csv" file as follows (with the commas in this case separating the individual data): 06/03/2005, 406, 131320, CA, 15

Note that commas are omitted from numbers entered into the "Odometer.csv" file (i.e., Fifty-five thousand, three hundred sixty-five is entered as 55365 and **not** 55,365).

If you enter multiple logs for a single vehicle or piece of equipment, they **must** be entered in descending order according to date. If, when the import utility is processing the data in "Odometer.csv", it encounters a log entry for a date that is chronologically less than the last log read by the program, it will ignore that log entry, although it will continue to process further entries in the file. Also, it is not necessary to have log entries in the file grouped together according to the vehicle or piece of equipment they refer to. And it is important that you do not combine log entries for equipment and vehicles into one file; they may only be all for pieces of equipment or all for vehicles.

Procedure for Importing Usage Logs

When you have entered the information into the "Odometer.csv" file and are ready to import the usage logs information, launch the EZ Maintenance application and use the following procedure to import this data into EZ Maintenance:

1. From the EZ Maintenance main menu, click on the Import Data button.
2. You will now be at the Import Data menu. Click on the Import Logs button.
3. Now click on the button with the ellipsis immediately to the right of the text field labeled Path. Then select the “*Odometer.csv*” file. The file and pathname you selected will appear in the aforementioned field.
4. Now select whether you want to import usage logs for equipment or vehicles. Select Import Vehicle Usage or Import Equipment Usage depending on what type of information the “*Odometer.csv*” file contains. Once you have selected the appropriate option, click the OK button.
5. You will receive a prompt informing you of the number of records from “*Odometer.csv*” that were imported successfully, and you will be returned to the Import Data menu.

If you would now like to import usage logs for equipment instead of vehicles or vice-versa, delete the records from the “*Odometer.csv*” file, enter the usage logs data in “*Odometer.csv*” for the equipment or vehicles you wish to import in the prescribed format, and repeat the above procedure.

Procedure for Importing Equipment Information

Important: Before you begin importing any equipment via the import utility, please make sure you have created maintenance profiles for those pieces of equipment you would like to import into EZ Maintenance. Each new piece of equipment imported into the application must be assigned a corresponding maintenance profile. Please refer to chapter 4 “Equipment Maintenance Module”/“Equipment Module Setup”/“Entering Maintenance Profiles” for information on how to create maintenance profiles.

1. From the EZ Maintenance main menu, click on the **Import Data** button.
2. You will now be at the **Import Data** menu. Click on the **Import Equipment** button.
3. You will now be at the **Equipment Information** window. Before proceeding further we must locate the Excel file in which the equipment information is located. To begin this, click on the **Import Data from Excel** button.
4. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named “*Equipment_Information*”. The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Equipment Information** window. This completes locating the Excel file in which the equipment information is located.
5. Now that we have located the Excel file with the equipment information, we must import this information into EZ Maintenance. To begin this, click the **Import Data into EZM** button. You will be taken to the **Import Data into EZM** window. Here equipment information can be imported in two ways; each piece of equipment can be imported individually, or the equipment can be imported in groups:
 - To import information for one piece of equipment at a time, begin by selecting the **One Record at a Time** option. Then click on the selection box labeled **Internal Control No.** The internal control numbers for the equipment listed in the Excel document will appear. Select the number corresponding with the piece of equipment you wish to import. Then click on the selection box labeled **Profile Name** and select the maintenance profile for this piece of equipment. Then click the **Import** button. This piece of equipment will now have been imported into the application. Repeat this procedure until the desired records have been imported into EZ Maintenance.
 - To import information for multiple pieces of equipment, begin by selecting the **Group of Records** option. Equipment can be imported in groups according to their name or their classification: select the appropriate option. Depending on whether you are importing by name or classification, click on the selection box labeled either **Equipment Name** or **Equipment Classification**. Select the name or classification belonging to the group of equipment which you wish to import. Then select the maintenance profile from the **Profile Name** selection box for this group of equipment. Then click the **Import** button. The group of equipment will now have been imported into the application. Repeat this procedure until the desired records have been imported into EZ Maintenance.

Procedure for Importing Vehicle Information

Important: Before you begin importing any vehicle information via the import utility, please make sure you have created service profiles for those vehicles you would like to import into EZ Maintenance. Each new vehicle imported into the application must be assigned a corresponding service profile. Please refer to chapter 5 “Vehicle Service Module”/“Vehicle Module Setup”/“Entering Service Profiles” for information on how to create service profiles.

1. From the EZ Maintenance main menu, click on the **Import Data** button.
2. You will now be at the **Import Data** menu. Click on the **Import Vehicles** button.
3. You will now be at the **Vehicle Information** window. Before proceeding further we must locate the Excel file in which the vehicle information is located. To begin this, click on the **Import Data from Excel** button.
4. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named “*Vehicle_Information*”. The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Vehicle Information** window. This completes locating the Excel file in which the vehicle information is located.
5. Now that we have located the Excel file with the vehicle information, we must import this information into EZ Maintenance. To begin this, click the **Import Data into EZM** button. You will be taken to the **Import Data into EZM** window. Here vehicle information can be imported in two ways; each vehicle can be imported individually, or the vehicles can be imported in groups:
 - To import information for one vehicle at a time, begin by selecting the **One Record at a Time** option. Then click on the selection box labeled **Internal Control No.** The vehicle numbers for the vehicles listed in the Excel document will appear. Select the number corresponding with the vehicle you wish to import. Then click on the selection box labeled **Profile Name** and select the service profile for this vehicle. Then click the **Import** button. This vehicle will now have been imported into the application. Repeat this procedure until the desired records have been imported into EZ Maintenance.
 - To import information for multiple vehicles, begin by selecting the **Group of Records** option. Vehicles can be imported in groups according to their name or their classification: select the appropriate option. Depending on whether you are importing by name or classification, click on the selection box labeled either **Vehicle Name** or **Vehicle Classification**. Select the name or classification belonging to the group of vehicles which you wish to import. Then select the service profile from the **Profile Name** selection box for this group of equipment. Then click the **Import** button. The group of vehicles will now have been imported into the application. Repeat this procedure until the desired records have been imported into EZ Maintenance.

Procedure for Importing Inventory Information

Important: Before you begin importing inventory information via the import utility, make sure that you have first imported all vendor information. For instructions on how to import vendor information, please see further down for the sub topic “Procedure for Importing Vendor Information”.

1. From the EZ Maintenance main menu, click on the **Import Data** button.
2. You will now be at the **Import Data** menu. Click on the **Import Inventory Items** button.
3. You will now be at the **Inventory Information** window. Before proceeding further we must locate the Excel file in which the equipment information is located. To begin this, click on the **Import Data from Excel** button.
4. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named “*Inventory_Information*”. The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Inventory Information** window. This completes locating the Excel file in which the equipment information is located.

5. Now you are ready to import inventory information into EZ Maintenance. Click on the **Import Data into EZM** button. This will import all of the records for inventory information in the Excel file into the application.

Procedure for Importing Customer Information

The following is the procedure for importing your customer information into EZ Maintenance using the import utility:

1. From the EZ Maintenance main menu, click on the **Import Data** button.
2. You will now be at the **Import Data** menu. Click on the **Import Customers** button.
3. You will now be at the **Customer Information** window. Here we can either decide to import customers or additional contacts for those customers. *Please note that main customer information must be imported prior to importing additional contacts. Being that this is the case for most users who are using this utility for the first time, these instructions will proceed under the assumption that no main customer information has yet been imported.*
4. Click on the **Main Customer** option. Now we must locate the Excel file in which the main customer information is located. To begin this, click the **Import Data from Excel** button.
5. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named "*Customer_Information*". The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Customer Information** window. This completes locating the Excel file in which the main customer information is located.
6. Now you are ready to import the main customer information into EZ Maintenance. Click on the **Import Data into EZM** button. This will import all of the records for main customer information in the Excel file into the application.
7. Now that we have completed importing the main customer information into the application, we are ready to also import the additional contacts for those customers. Select the **Additional Contacts** option, then click on the **Import Data from Excel** button.
8. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named "*Customer_Additional_Information*". The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Customer Information** window.
9. Click on the **Import Data into EZM** button. This will import all of the records for additional customer contacts in the Excel file into the application.

Procedure for Importing Vendor Information

The following is the procedure for importing your vendor information into EZ Maintenance using the import utility:

1. From the EZ Maintenance main menu, click on the **Import Data** button.
2. You will now be at the **Import Data** menu. Click on the **Import Vendors** button.
3. You will now be at the **Vendor Information** window. Here we can either decide to import vendors or additional contacts for those vendors. *Please note that main vendor information must be imported prior to importing additional contacts. Being that this is the case for most users who are using this utility for the first time, these instructions will proceed under the assumption that no vendor information has yet been imported.*
4. Click on the **Main Vendor** option. Now we must locate the Excel file in which the main vendor information is located. To begin this, click the **Import Data from Excel** button.
5. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named "*Vendor_Information*". The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Vendor Information** window. This completes locating the Excel file in which the main vendor information is located.

6. Now you are ready to import the main vendor information into EZ Maintenance. Click on the **Import Data into EZM** button. This will import all of the records for main vendor information in the Excel file into the application.
7. Now that we have completed importing the main vendor information into the application, we are ready to also import the additional contacts for those vendors. Select the **Additional Contacts** option, then click on the **Import Data from Excel** button.
8. Now click on the button with the ellipsis immediately to the right of the text field labeled **Select the File**. Then select the Excel file named “*Vendor_Contact_Information*”. The file and pathname you selected will appear in the aforementioned field. Click the **OK** button. You will be returned to the **Vendor Information** window.
9. Click on the **Import Data into EZM** button. This will import all of the records for additional vendor contacts in the Excel file into the application.

View Error Logs

While using the import utility, whenever information is imported from Excel or imported into EZ Maintenance using the **Import Data from Excel** and **Import Data into EZM** buttons respectively, you will receive a message box prompting you to “Please View Error Log File”. There are two error log files corresponding with each type of information to import: Equipment, Vehicles, Inventory, Customers, and Vendors. One error log file records activity for importing data from Excel, and the other records activity for importing data into EZM. These error log files provide information on whether an import operation proceeded successfully. Once prompted as above after performing an import operation, you may view the accompanying error log file by clicking on the **View Error Log** button.

A history of error logs can be viewed by entering the import utility and clicking on the **View Error Log** button. You will be taken to a window where you can choose to view log files for a variety of import operations. First choose whether you would like to see a report for importing data from Excel or importing data into EZM. Then click on the button for the type of information whose import activity you would like to view. A history of all of the import logs for that particular import operation will appear.

From this same window it is also possible to clear the error logs entirely by pressing the **Clear All Error Log** button. Use this feature carefully as once the error logs are cleared, you will not be able to retrieve this information.

Registering Additional User Licenses

EZ Maintenance offers the option of purchasing additional user licenses which allow more people to use the software simultaneously. To add user licenses to the software after you have purchased them, click on the **Add User Licenses** button on the EZ Maintenance main menu. This will open the **EZ Maintenance Registration** window:

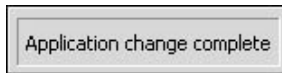
The image shows a dialog box titled "EZ Maintenance Registration". The text inside the dialog reads: "To register your additional licenses, make sure your PC is connected to the internet. Fill in the data below, then click on the OK button." Below this text are two text input fields, one labeled "Key Code 1:" and the other "Key Code 2:". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

This window is used only for registering additional user licenses, and it is not used for registering it for a full install (i.e. server install) on a particular computer or for registering it for use on a workstation.

Important: You must be connected to the internet while you attempt to register your additional user licenses.

When you purchase additional user licenses, you will be sent a pair of numerical registration codes, one of which is called the “License ID” and the other the “Password”. You enter the License ID into the **Key Code 1** field and the Password into the **Key Code 2** fields that are in this center of this window. Click in each field and enter the appropriate numerical code.

Once you have correctly entered the codes, click on the **OK** button. EZ Maintenance will attempt to register your additional user licenses. If registration was successful, you will see the following message in the upper-left hand corner of the screen:



Once registration has succeeded, the amount of people able to simultaneously access the software will be incremented by the number of additional user licenses you purchased.

If you wish to leave the **EZ Maintenance Registration** window without registering any additional user licenses, click on the **Cancel** button.

To purchase additional user licenses, call your sales representative at (818) 574-3970.

About

Clicking on the **About** button on the EZ Maintenance main menu opens up a window which gives the current version of the software:

