



Maintenance Contract Basics  
Webinar  
July 2010



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Overview

This webinar will review the basics required to understand and process maintenance contracts in the Ascente – Service Dispatch module. This will allow you to automate the scheduling and creation of service orders and work orders for both the billing and servicing of your maintenance contracts. Without this ability you would have to remember to manually create the service orders and work orders to bill and/or service your maintenance contracts. The more maintenance contracts you have, the more you will see the benefits of automating this processing using Ascente.

Maintenance contracts are often also referred to as service contracts, service agreements, preventative maintenance contracts, PM's and I am sure there are others. They all refer to the same thing for the purpose of this webinar.

Objectives

- Maintenance Contract Setup
  - Service
  - Billings
- Generating Maintenance Service Orders and Invoices
- Reporting
  - Maintenance Contracts reports
    - Annual Maintenance Schedule
    - Manpower Requirements
  - Expired Contracts
  - Label Printing

Assumptions

- You are licensed to use the Ascente – Service Dispatch and Maintenance modules.
- Every maintenance contract is linked to a jobsite record.
- All maintenance contracts run for a period of time and have a contract end date.
- A maintenance contract is considered expired once the contract end date has been past.
- A service order for either billing or service will NOT be created when the *next creation date* has exceeded the *contract end date*.

Jobsite Maintenance

Jobsite Acme Conference Center

Contract AC-FC \*Expired\*

General Defaults Billing Service Budget Components

General

Start Date 1/1/2009

End Date 12/31/2009

Business Category Full Coverage

When a contract is renewed, you will need to edit the 'End Date' to be the new contract end date. For example 12/31/2010 if this was renewed for another year.

Note that the system date of 6/28/2010 is past the end date of 12/31/2010. This is why the contract is flagged as \*Expired\*

Created: 1/9/2009 3:13:00 PM Changed: sa 6/8/2009 7:08:00 PM 6/28/2010 4:05 PM

- Someone will add and maintain the maintenance contracts as necessary
- Someone will as necessary, typically monthly, create the maintenance service orders for the servicing and billing of the service contracts.
- Someone will contact the expiring contracts and hopefully get them to renew their maintenance contract.
- Someone will edit the contract end date for the renewed contracts to the new contract end date. For example; if a contract ended on 12/31/2009 and it was renewed for another year, the contract end date would need to be changed to 12/31/2010.

### Considerations

There are different ways that maintenance contracts can be processed. This typically depends on if your clients are commercial or residential and if you are providing HVAC or plumbing service. How you answer these questions, will determine how you will process maintenance contracts using Ascente.

- Do you only schedule service after you have received payment for the maintenance contract?
- Do you bill prior to providing the service?
- Do you collect or bill for the maintenance service only after the service has been provided?
- Do you provide multiple scheduled services a year or just an annual inspection?
- Do you ever bill at a different frequency than you provide service? For example you could bill monthly, but provide service quarterly.
- Do you have different skill levels of technicians that are used for different services? For example a filter changer as opposed to a journeyman for the more skilled labor.
- Do you provide preferred pricing for your jobsites that have purchased a maintenance contract?
- Are filters, belts, Freon or other items included in the price of the maintenance contract?

### Recommendations

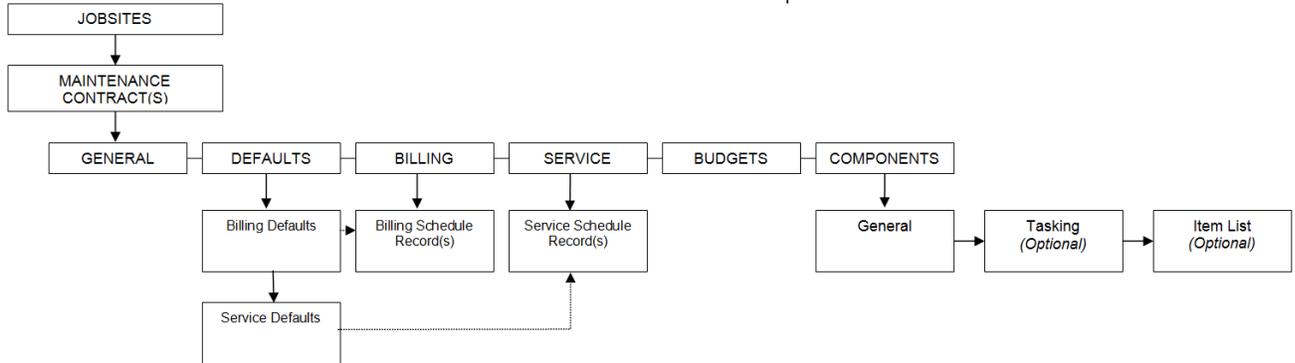
- It has been our experience that every company should have one person assigned with the responsibility of maintaining the maintenance contracts. We have seen companies where this was not the case and it resulted in a lot of extra work and grief to get caught up. Billings and services can get missed. It is easier to keep the system current than to determine what needs to be fixed and then fixing things.
- Keeping these contracts current is very important. It is easier to keep these contracts current on a monthly basis then to have to go back a few months and try to get them current. I am referring to:
  - Creating the service and billing service orders.
  - Servicing the contracts
  - Invoicing the contracts
  - Entering new contracts
  - Renewing expired contracts
  - Updating the contract prices

### Processing Cycle

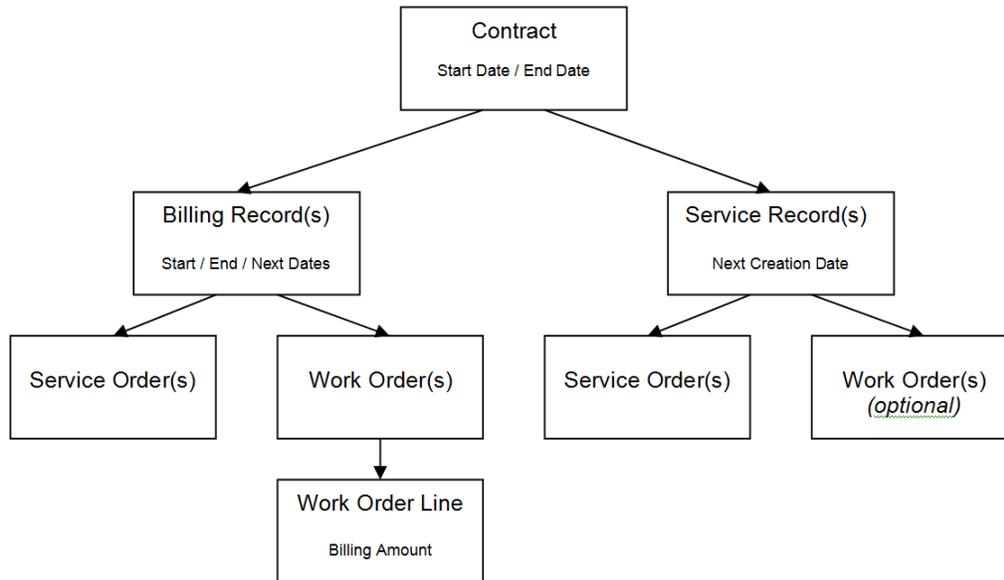
- This is a typical processing cycle.
  - Monthly Or As Needed
    - Create Maintenance Service Orders
      - Service orders for advance billing
      - Service orders for providing the service
    - Run a Prebill and update the advance billing service orders
    - Optionally print the tasking service orders and distribute them to the technicians
  - Daily Or As Needed
    - Enter newly sold maintenance contracts
    - Determine contracts due to expire soon
    - Try to renew the expiring contracts
    - Renew the contracts that are renewing and adjust pricing as necessary
    - Call to schedule the maintenance service for the existing maintenance service orders
    - Service the maintenance contracts
    - Invoice the service orders and be sure all associated costs are applied to the work orders

Flowcharts

Maintenance Contracts



Create Maintenance Service Orders

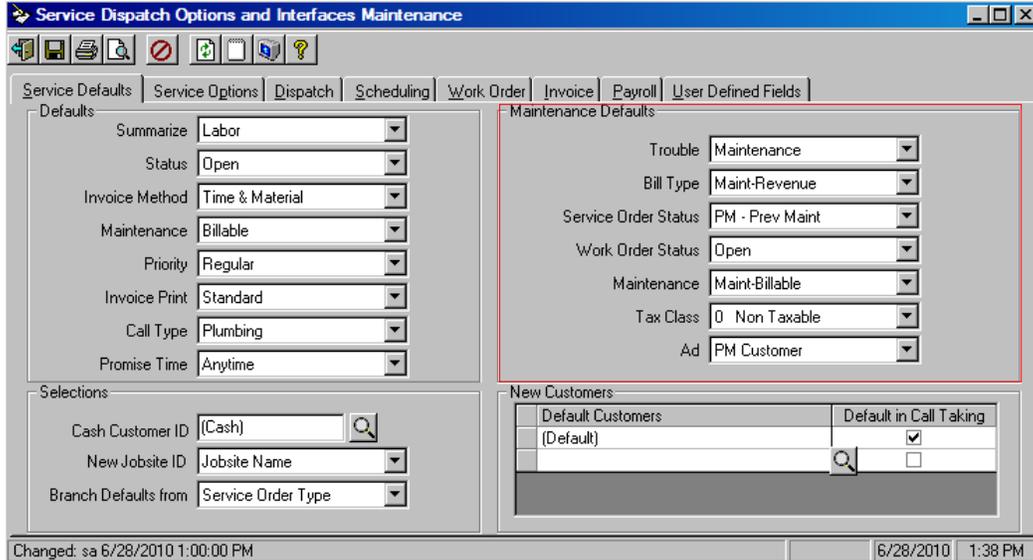


Options and Interfaces (Service)

Service Tab

- You need to setup your Service Dispatch – Options and Interfaces setting defaults for your maintenance contracts.

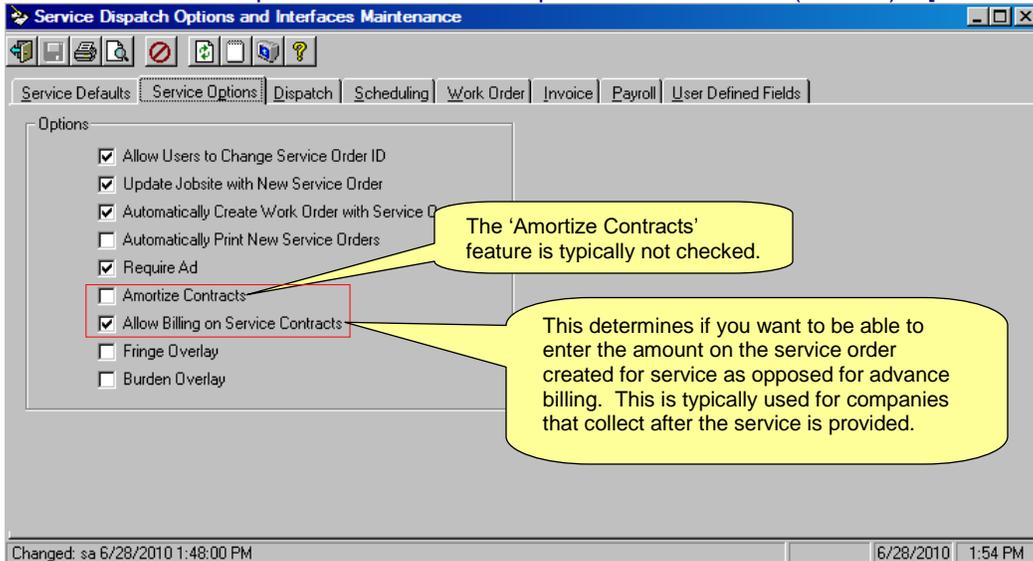
- o Ascente / Service Dispatch / Maintenance / Options and Interfaces (Service) – [Service Defaults] tab



o Changed: sa 6/28/2010 1:00:00 PM 6/28/2010 1:38 PM  
**Figure 1: Service Dispatch - Options and Interfaces (Service) [Service Defaults] tab**

Service Options Tab

- o Ascente / Service Dispatch / Maintenance / Options and Interfaces (Service) – [Service Options] tab



o Changed: sa 6/28/2010 1:48:00 PM 6/28/2010 1:54 PM  
**Figure 2: Service Dispatch - Options and Interfaces (Service) [Service Options] tab**

Adding a Maintenance Contract

## Contract

- Select the jobsite record that has purchased a maintenance contract. You will need to add it if it does not already exist.
  - Ascente / Service Dispatch / Maintenance / Jobsite
- Click on the [Maintenance] tab
  - Ascente / Service Dispatch / Maintenance / Jobsite [Maintenance] tab

○ **Figure 3: Jobsite – Maintenance – Contract [General] tab**

- Add a contract code and then enter the following fields on the [General] tab.
  - Start Date
  - End Date
  - Business Category
    - This is used by the Jobsite Performance Report

Defaults Tab

- Click on the [Defaults] tab
  - These are the defaults values to be used when service orders and optionally work order are created for service and/or billing by the Create Maintenance Service Orders program. Use the 'Defaults for' selection to determine if you are entering the default values for the service or billing service orders. Billing defaults are used for service orders created based on the [Billing] tab records. Service defaults are used for service orders created based on the [Service] tab records.

Defaults Tab – Service

- Note that the 'Defaults for' selection to determine if you are entering the default values for the service or billing. Select 'Service'.
- These are the defaults values to be used when service orders and optionally work order are created for servicing this maintenance contract. The Create Maintenance Service Orders program will use these default values when creating the service order for this contract's 'Service' records.

The screenshot shows the 'Jobsite Maintenance' application window. The 'Defaults' tab is active, and the 'Defaults for' dropdown is set to 'Service'. A red arrow points to this dropdown. The 'Invoice' section shows 'WO Status' set to 'Open'. The 'Maintenance' dropdown is set to 'Maint-Full Coverage'. The 'Price ID' is set to '(None)'. The 'Service Order' section shows 'SD Status' set to 'PM - Prev Maint'. The 'Salesperson' is listed as 'G.J.L. Gregg Joseph Lukeski'. The status bar at the bottom indicates the record was created on 1/28/2003 and changed on 6/4/2009.

Callout boxes provide the following information:

- The 'Defaults for: Service' are associated with the service records on the [Service] tab.
- No charge for labor or material included in the contract.
- Set this to 'Open' if you want a work order created. Or 'None' if you do not need a work order created.
- This is typically 'PM – Prev Maint' or 'Open', not 'Closed'
- This indicates that a special pricing arrangement exists.

Figure 4: Jobsite – Maintenance – Defaults – Service

Defaults Tab – Billing

- Note that the 'Defaults for' selection to determine if you are entering the default values for the service or billing. Select 'Billing'.
- These are the defaults values to be used when service orders and work order are created for advance billing this maintenance contract. The Create Maintenance Service Orders program will use these default values when creating the service order and work order for this contract's 'Billing' records.

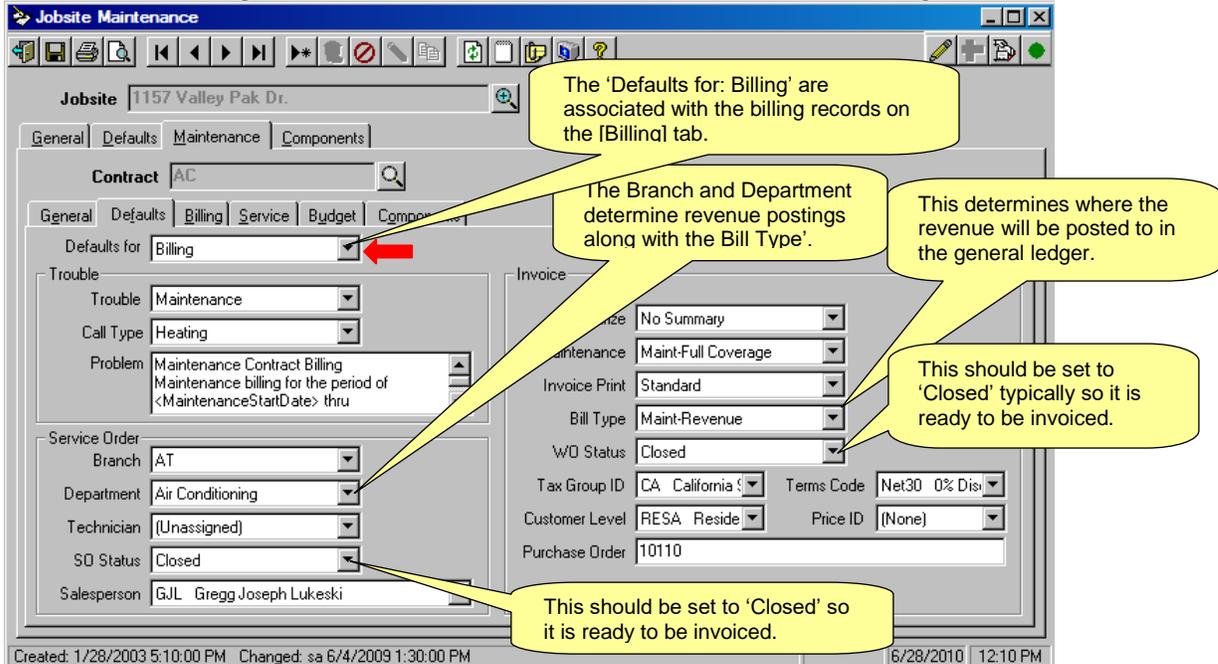


Figure 5: Jobsite – Maintenance – Defaults - Billing

Problem Field – Runtime Inserts

Clients have requested that the service order and invoice for advance billing indicate the beginning and ending dates for the month that this service order is for. This can be done using the following print-time inserts:

- <ContractStartDate> Prints the start date of the contract
- <MaintenanceStartDate> Prints the start date for the maintenance period
- <MaintenanceEndDate> Prints the end date for the maintenance period

For Example the following verbage may be entered in the problem area;  
"Scheduled maintenance for <MaintenanceStartDate> thru <MaintenanceEndDate>."

The results that will display in the service order problem field are:  
*Scheduled maintenance for 7/01/2010 thru 7/31/2010.*

You can cut and paste the above into the problem field.

Billing Tab

- Click on the [Billing] tab
  - This is where you specify billing schedule for current maintenance contract.
  - If a billing record is added, a customer other than the (Cash) customer needs to be linked to the jobsite record. This is because an accounts receivable invoice and the associated general ledger postings will happen once the service order resulting from this billing entry is goes through the Prebill cycle.
  - A service order will be created for each row added.

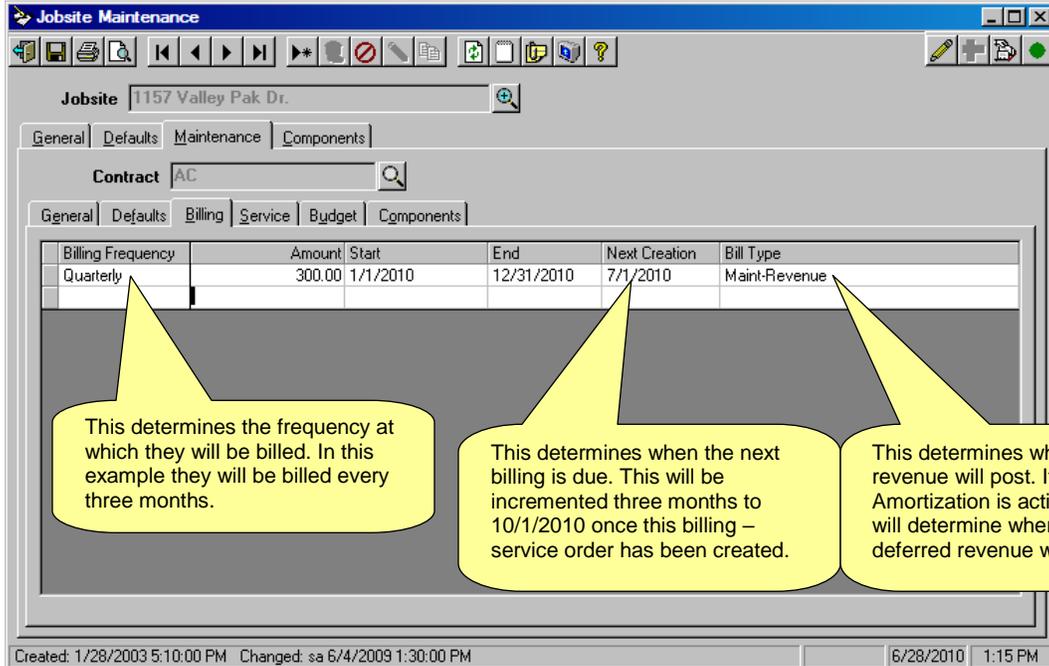


Figure 6: Maintenance Contract - [Billing] tab

Service Tab

- Click on the [Service] tab
  - This is where you specify service schedule for current maintenance contract.
  - A service order will be created for each row added.

The screenshot shows the 'Jobsite Maintenance' application window. The 'Jobsite' is '1157 Valley Pak Dr.' and the 'Contract' is 'AC'. The 'Service' tab is active, showing a table with the following data:

Labor Grade	Technician	Amount	Day of Month	Next Creation Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Filter Change	Brad Graham	0.00	1	7/1/2010	<input checked="" type="checkbox"/>											
			0		<input type="checkbox"/>											

Callout boxes provide the following information:

- Day of Month:** This will determine the default promise date for the service order. In this example, the service order will have a promise date of the 1<sup>st</sup> of the month.
- Month Checkboxes:** These determine the months that the service needs to be performed.
- Hours... Button:** Click on the [Hours] button to enter the budgeted hours required for each service.
- Labor Grade:** Select the skill grade required for this preventative maintenance service. You can add additional rows if other skill levels are required.
- Next Creation Date:** This determines when the next service is due. This will be incremented one month to 8/1/2010 once this service – service order has been created based on the months that are checked.

At the bottom of the window, it shows: Created: 1/28/2003 5:10:00 PM Changed: sa 6/4/2009 1:30:00 PM 6/28/2010 3:23 PM

Figure 7: Maintenance Contract - [Service] tab

Generating Maintenance Service Orders and Invoices

This process is used create the new service orders and work orders all of the billing and service contract records that are due. This is typically run once a month, but it could be run more frequently.

Create Maintenance Service Orders

Runtime Options

- You will need to run the Create Maintenance Service Orders program.
  - Service Dispatch / Periodic / Create Maintenance Service Orders
    - Runtime Criteria
      - Optionally select a range of branches
      - Enter the 'Select Through' date to use to select the contracts to select.
        - This date is compared to the 'Next Creation Date' and if this date is not after the 'Select Through' date and the contract is not expired, a service order and work order will be created.
        - Note that you can't enter a date more than 60 days in the future from the current date.
      - Optionally select a department and service order type

Register

- Click on the [Register] button
  - Review the register and if there is a problem:
    - Close out of the Create Maintenance Service Orders form
    - Correct the problem
    - Rerun the Create Maintenance Service Orders - Register

Update

- When the register is correct, click on the [Update] button to create the maintenance service orders and work orders and increment the *next creation dates* in the billing and service records.

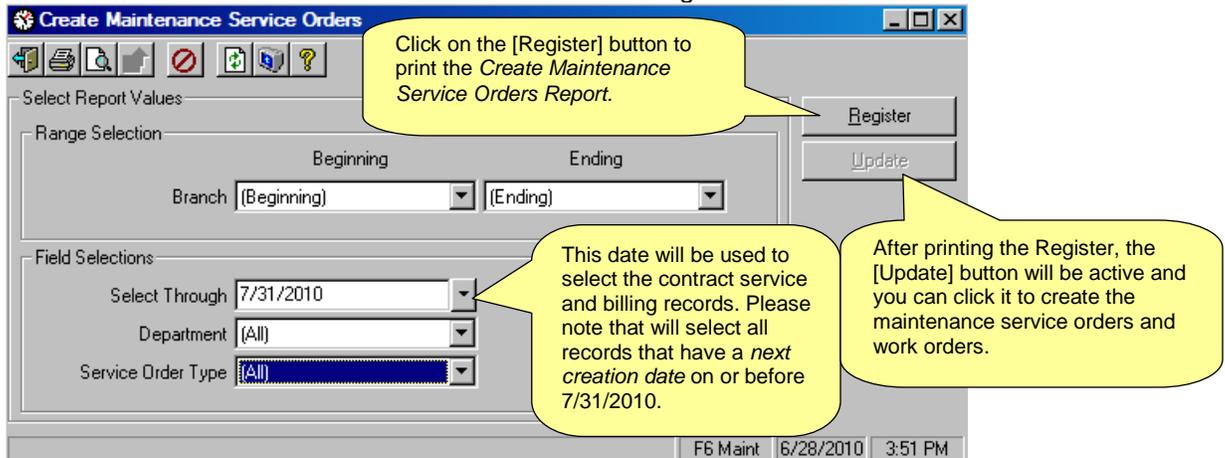


Figure 8: Create Maintenance Service Orders form

JobsiteName		Jobsite	Contract	Cust ID	Maint Date	SO Status	WO Status	SO Type	Maint Price	Svc
Branch Name		LA								
Department		Air Conditioning								
Scott, Troy		1157 Valley Pak Dr.	AC	(Cash)	7/01/10	Closed	Closed	Heating	\$300.00	
Scott, Troy		1157 Valley Pak Dr.	AC	(Cash)	7/01/10	PM - Prev Maint	Open	Heating	\$0.00	X
Air Conditioning							2 Department Records Printed		\$300.00	
LA							2 Branch Records Printed		\$300.00	
<b>Grand Total:</b>							2 Records Printed		\$300.00	

Each of these lines on this report will result in a service order and possibly a work order will be created.

Note that the billing service & work order are both closed so that they are ready to be invoiced.

The 'X' in the service column indicates that this service order is for servicing the maintenance contract. If there is not an 'X', then this is for billing.

- You can now print the service orders in the standard 'Service Order' or 'Tasking Service Order' format. This is done using the [Ascente / Service Dispatch / Reports / Service Order Print](#) program.

Results to Billing and Service Records

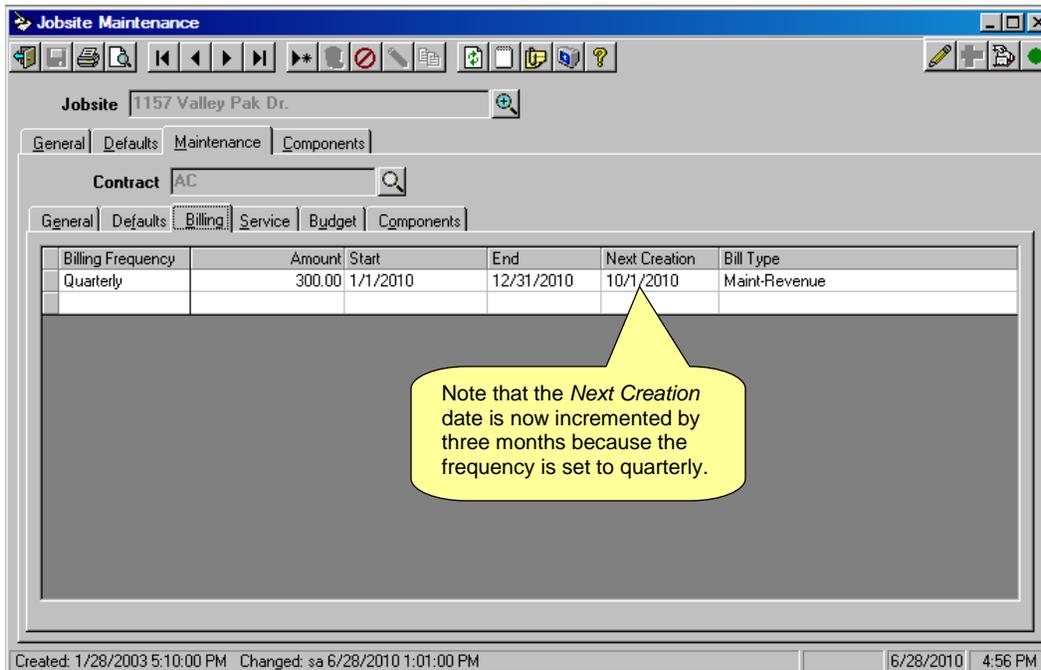
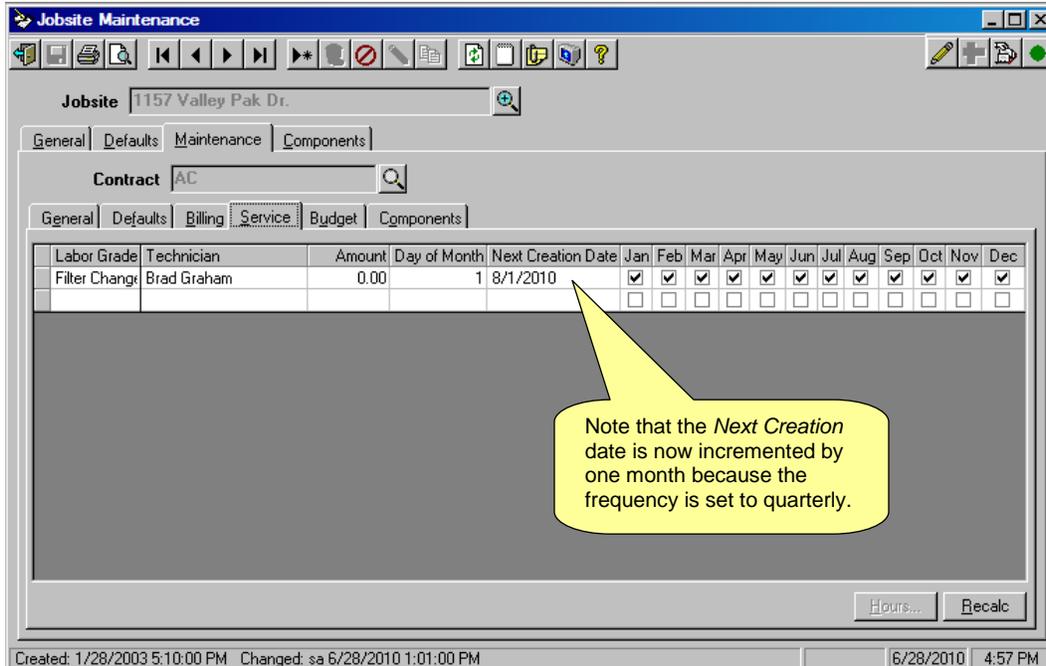


Figure 9: Jobsite - Maintenance - [Billing] tab



**Figure 10: Jobsite - Maintenance - [Service] tab**

## Invoicing Maintenance Service Orders

### Bill in Advance - Maintenance Service Orders

For service orders that are created for billing from the [Jobsite / Maintenance / \[Billing\] tab](#) records, you should not have to do any processing in Work Orders to invoice these assuming that:

- Your default settings in the [Jobsite / Maintenance / \[Defaults\] tab](#) for Billing are correct.
  - The default service order status was set to 'Closed'
  - The default work order status was set to 'Closed'
- The jobsite references a customer other than the (Cash) customer
- If you have the 'Update by User Only' option set in the [Ascente / Service Dispatch / Maintenance / Options and Interfaces \(Service\) – \[Invoice\] tab](#), the user that ran the 'Create Maintenance Service Orders' program, must be the operator to run the Prebill process to invoice these service orders.

Typically these maintenance service orders for advance billing are invoiced in a batch by themselves immediately after running the "Create Maintenance Service Orders" program. Set the Prebill runtime option "Repair/Maintenance" to be "Maintenance" so that only service orders that reference a maintenance contract will be selected.

### Service - Maintenance Service Orders

For service orders that are created for providing the preventative maintenance service from the [Jobsite / Maintenance / \[Service\] tab](#) records, you will have to do your standard processing:

- In order for the Jobsite Performance Report to categorize this service order correctly, make sure that the 'Maint' field on the Call Taking Screen [General] tab is set to either:
  - Maint – Billable
  - Maint – Full Coverage
  - Maint – Labor Free
  - Maint – Material Free
- Dispatch the service order to a technician so the service gets performed and the service order status is set to 'Closed'.
- You should always make sure all costs and sales are applied to the work order before invoicing the service order.

- These can be invoiced in a batch with other non-maintenance service orders or you can set the Prebill runtime option “Repair/Maintenance” to be “Maintenance” so that only service orders that reference a maintenance contract will be selected.

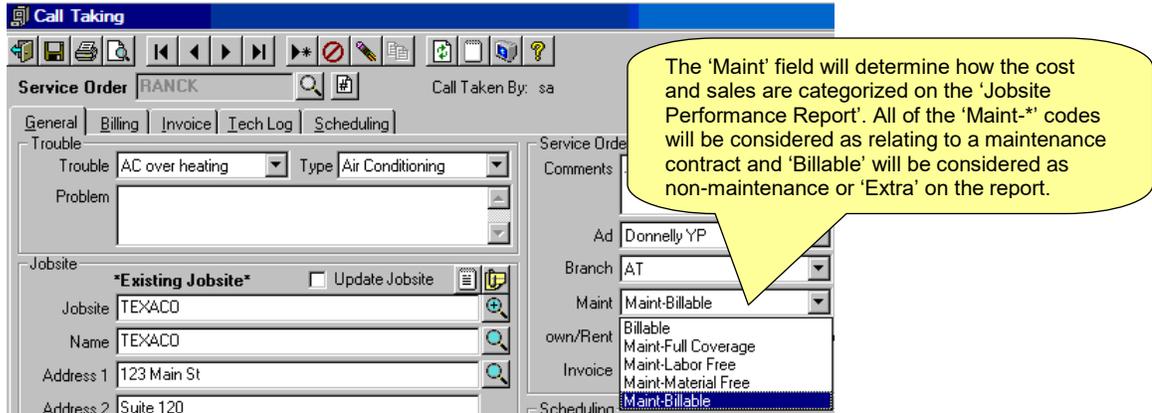


Figure 11: Call Taking - 'Maint' field settings

Prebill

Run the [Service Dispatch / Journals / Prebill](#) to invoice the maintenance service orders. The actual Prebill process for maintenance service orders is really not any different than the Prebill process for non-maintenance service orders.

Runtime Criteria

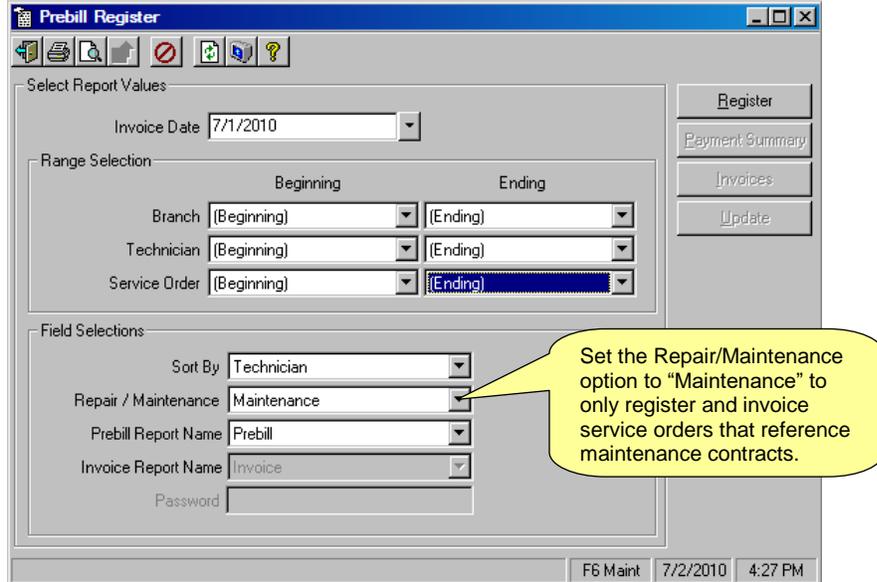


Figure 12: Prebill - Runtime Criteria

Reporting

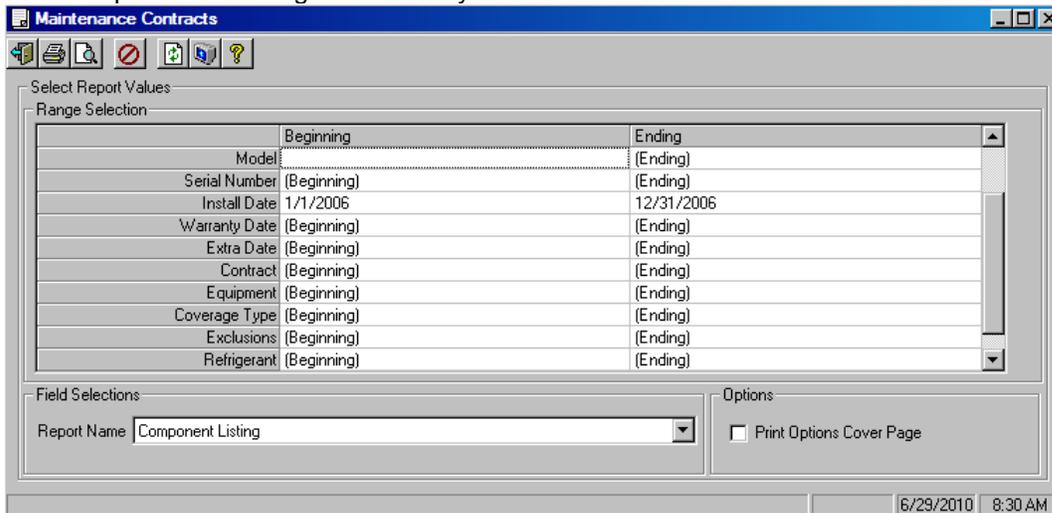
Maintenance Contracts Reports

- [Service Dispatch / Reports / Maintenance Contracts](#)

Component Listing

The Component Listing provides a detail list of all components (equipment) that have been defined for a jobsite on the Components tab.

- This list can be given to a technician for them to gather missing information regarding the components (ie, model, serial number, etc).
- This also could be given to a customer so they can see the full list of equipment they have in place.
- This can be used to market to your jobsites. For example; you could print a listing of all units installed within a specific date range and then try to sell them a maintenance contract or service.



**Figure 13: Service Dispatch / Reports / Maintenance Contracts - Component Listing**

Local Identifier		Model		Manufacturer		SerialNumber	Contract	Working Chrg	EPA
Install Date	Warr Date	Exp	Extra Date	User Defined Fld #1	User Defined Fld #2	Refrigerant	Equipment	WC UQM	Req'd
<b>Jobsite: 916 Beachwood Ave</b>				<b>Cust: Atm047</b>					
BAKER, KEN 916 BEACHWOOD AVE ANAHEIM, CA 92850				LASTMNE, FIRSTNAME M 980 PARKER STREET ANAHEIM, MN 56444					
<b>Condenser</b>	34563456			Trane		543643564356		.00	
1/01/07	12/31/09	<input checked="" type="checkbox"/>							
<b>Records: 1</b>									
<b>Jobsite: Arco 1009</b>				<b>Cust: Atm053</b>					
ARCO 2310 STEVE REYNOLDS NORCROSS, GA 30093				LAST, FIRST M 6023 HOWARD STREET SUITE 701 NORCROSS, SD 57442					
<b>Condenser</b>	TR908700			Trane		ADC234	AC	.00	
1/01/07	12/31/09	<input checked="" type="checkbox"/>				Refrigerant	Air Compressor	Pound	
<b>Records: 1</b>									
<b>Jobsite: Rubble, Barney</b>				<b>Cust: (Cash)</b>					
RUBBLE, BARNEY 3822 BRASELTON DACULA, GA 30019				CASH CUSTOMER FOR ASCENTE ADDRESS1 ADDRESS2 DACULA, ST 999999999					
<b>FAU1</b>	H871600-22			Trane		32132132-325250A		.00	
12/08/06	12/08/11								
<b>Records: 1</b>									
<b>Report Totals</b>								<b>Records: 3</b>	<b>Jobsites: 3</b>

**Figure 14: Component Listing Report**

Contract Listing

The Contract Listing provides a detail list of all contracts that have been defined for a jobsite on the Maintenance tab. This listing includes the contracts current status, and counts of active/expired contracts.

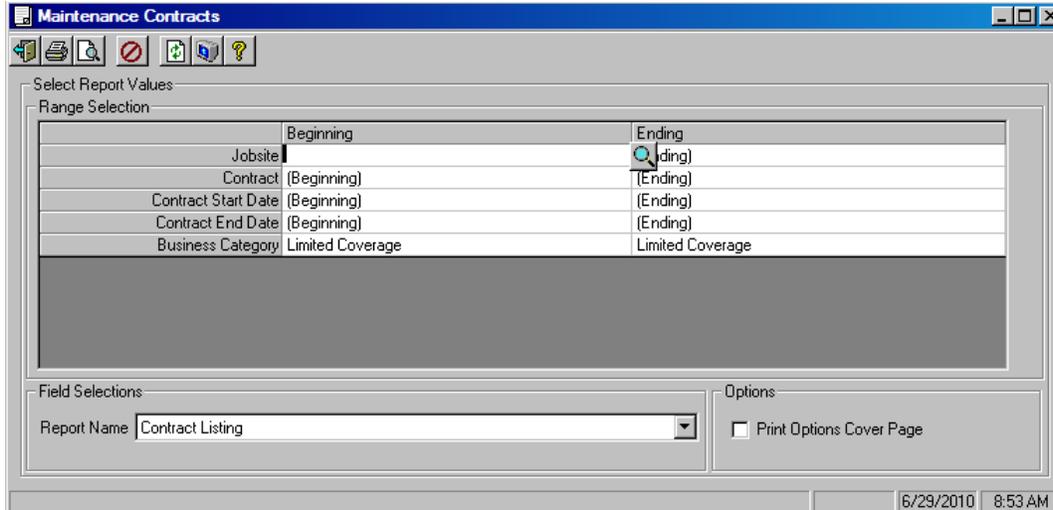


Figure 15: Service Dispatch / Reports / Maintenance Contracts - Contract Listing

06/29/10  
8:56 am

Continental Products Unlimited  
Contract Listing

Page 1 of 2

Jobsite	Name	Contract	Start	End	Status as of 6/29/10	Category
1033a Winchester Dr	Jones, Sally	A	3/03/05	3/03/06	Expired!	Limited Coverage
1080 Elm St	Benion, James	TEST	2/18/00	1/31/20	Active	Limited Coverage
1157 Valley Pak Dr.	Scott, Troy	CASHCUST	6/04/09	6/04/10	Expired!	Limited Coverage
1200 W. Commonwaelth	Fullerton City Hall	HVAC	1/01/10	12/31/10	Active	Limited Coverage
916 Beachwood Ave	Baker, Ken	AC	1/01/07	12/31/08	Expired!	Limited Coverage
916 Beachwood Ave	Baker, Ken	HEAT	1/01/07	12/31/07	Expired!	Limited Coverage
916 Beachwood Ave	Baker, Ken	Plumbing	1/01/07	12/31/07	Expired!	Limited Coverage
Arco 1009	Arco	AC	1/01/08	12/31/08	Expired!	Limited Coverage
Berkley	Berkley	1	5/01/08	4/30/11	Active	Limited Coverage
Dupe1	Dupe1	dupe1	1/01/07	12/31/07	Expired!	Limited Coverage
KFC	Kentucky Fried Chicken	AC	2/01/10	2/28/11	Active	Limited Coverage
TEXACO	TEXACO	AC	1/06/00	2/04/15	Active	Limited Coverage
TEXACO	TEXACO	Full Coverage	11/08/99	12/31/07	Expired!	Limited Coverage
TEXACO	TEXACO	Service	8/01/98	12/31/07	Expired!	Limited Coverage

Report Totals	
Contracts:	14
Jobsites:	10
Active Contracts:	5
Expired Contracts:	9

Contracts By Category	Active	Expired!	Total
Limited Coverag	5	9	14
Total	5	9	14

Contract Listing - Billing

Billing - Lists the details of contracts that are set up to bill independently and in advance of the service being performed. The Contract Listing - Billing provides a detail list of all contracts that have been defined for a jobsite on the Maintenance tab, Billing sub tab.

Print the Contract Listing – Billing report to:

- List all billing records
- Print a listing of all billing records set to end within a specific date range
- Determine which jobsites have billing records

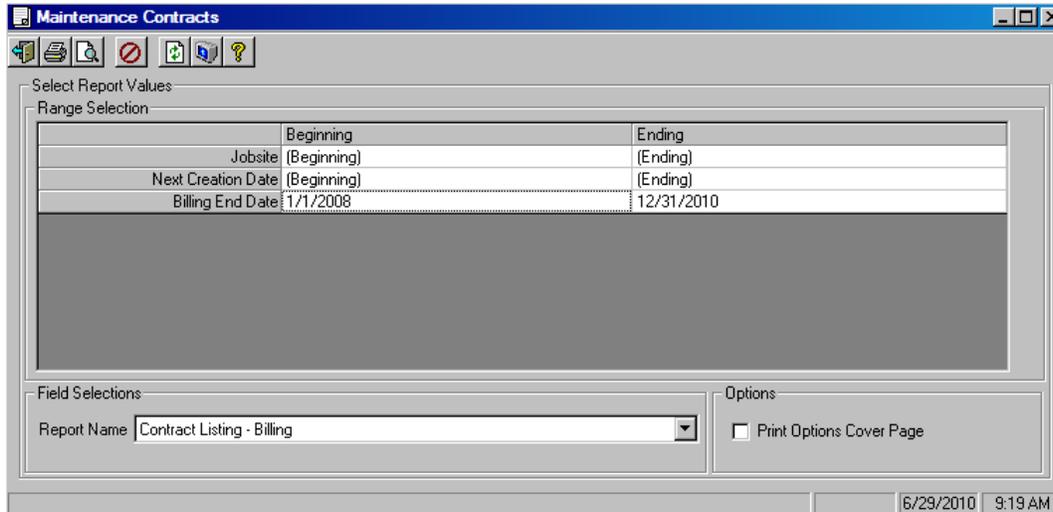


Figure 16: Service Dispatch / Reports / Maintenance Contracts - Contract Listing - Billing

6/29/10 Page 1 of 1

9:18 am **Continental Products Unlimited**

**Billing - Maintenance Contract Listing**

Jobsite	Contract	Frequency	Amount	Start	End	Next Billing	Billing Type
Jobsite: 1157 Valley Pak Dr.		Name: Scott, Troy					
Contract: AC	Start: 1/01/10	End: 12/31/10					
	Quarterly	300.00	1/01/10	12/31/10	10/01/10	Maint-Revenue	
Jobsite: 1200 W. Commonwealth		Name: Fullerton City Hall					
Contract: HVAC	Start: 1/01/10	End: 12/31/10					
	Monthly	100.00	1/01/10	12/31/10	2/01/10	Maint-Revenue	
Jobsite: Acme Conference Center		Name: Acme Conference Center					
Contract: AC-FC	Start: 1/01/09	End: 12/31/09					
	Monthly	100.00	1/01/09	12/31/09	5/01/09	Maint-Revenue	
Jobsite: Arco 1009		Name: Arco					
Contract: AC	Start: 1/01/08	End: 12/31/08					
	<b>** EXPIRED **</b>	Monthly	1,000.00	1/01/08	12/31/08	1/01/09	Maint-Revenue
		Annual	777.00	6/01/08	10/31/08	6/01/08	Maint-Rev Deferra

<u>REPORT TOTALS</u>	
Jobsites:	4
Contracts:	5
Current Contracts:	4
Expired Contracts:	1

Figure 17: Contract Listing - Billing

Contract Listing - Service

The Contract Listing - Service provides a detail list of all contracts that have been defined for a jobsite on the Maintenance tab, Service sub tab that have a service schedule, but can optionally be billed at time of service.

Print the Contract Listing – Service report to:

- List all service records to verify they are setup correctly.
- Print a report to list the service records and the months to be services along with the budgeted hours for each service.
- Print a listing of all service records set to end within a specific date range.

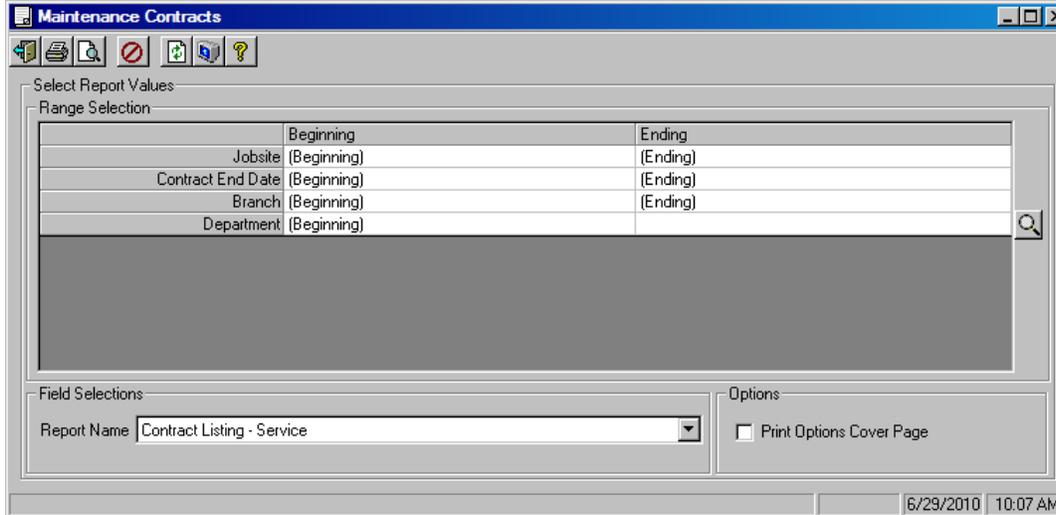


Figure 18: Service Dispatch / Reports / Maintenance Contracts - Contract Listing - Service

6/29/10 10:06 am												Continental Products Unlimited Service - Maintenance Contract Listing												Page 1 of 7																																			
<b>1033a Winchester Dr Jones, Sally</b>												Branch: LA Dept: Air Conditioning												<b>EXPIRED!</b>																																			
<b>Contract A</b>												<table border="1"> <tr> <th>Start Date</th> <th>End Date</th> <th>Next Svc Date</th> <th>Labor Grade</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Total</th> </tr> <tr> <td>3/03/05</td> <td>3/03/06</td> <td>3/15/06</td> <td>F Filter Changer</td> <td></td> <td></td> <td>X</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> </tr> </table>												Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	3/03/05	3/03/06	3/15/06	F Filter Changer			X										1		
Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total																																											
3/03/05	3/03/06	3/15/06	F Filter Changer			X										1																																											
SO Status: Open WO Status: Open Maint: Ma Int-Full Coverage Maintenance Billing Amount: 1,200.00												Svc: 1 Hours: .00																																															
<b>Contract A</b>												<table border="1"> <tr> <th>Start Date</th> <th>End Date</th> <th>Next Svc Date</th> <th>Labor Grade</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Total</th> </tr> <tr> <td>3/03/05</td> <td>3/03/06</td> <td>3/16/06</td> <td>J Journeyman</td> <td>X</td> <td>12</td> </tr> </table>												Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	3/03/05	3/03/06	3/16/06	J Journeyman	X	X	X	X	X	X	X	X	X	X	X	X	12		
Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total																																											
3/03/05	3/03/06	3/16/06	J Journeyman	X	X	X	X	X	X	X	X	X	X	X	X	12																																											
SO Status: Open WO Status: Open Maint: Ma Int-Full Coverage Maintenance Billing Amount: 25.00												Svc: 12 Hours: 12.00																																															
<b>Totals: 1033a Winchester Dr</b>												<table border="1"> <tr> <td>2</td> <td>- Service Record(s)</td> <td>Svc Count:</td> <td>1</td> <td>1</td> <td>2</td> <td>1</td> <td>13</td> </tr> <tr> <td>1</td> <td>- Contract(s)</td> <td>Hours:</td> <td>1.00</td> <td>12.00</td> </tr> </table>												2	- Service Record(s)	Svc Count:	1	1	2	1	1	1	1	1	1	1	1	1	1	13	1	- Contract(s)	Hours:	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	12.00		
2	- Service Record(s)	Svc Count:	1	1	2	1	1	1	1	1	1	1	1	1	1	13																																											
1	- Contract(s)	Hours:	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	12.00																																											
<b>1157 Valley Pak Dr. Scott, Troy</b>												Branch: LA Dept: Air Conditioning																																															
<b>Contract AC</b>												<table border="1"> <tr> <th>Start Date</th> <th>End Date</th> <th>Next Svc Date</th> <th>Labor Grade</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Total</th> </tr> <tr> <td>1/01/10</td> <td>12/31/10</td> <td>8/01/10</td> <td>F Filter Changer</td> <td>X</td> <td>12</td> </tr> </table>												Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	1/01/10	12/31/10	8/01/10	F Filter Changer	X	X	X	X	X	X	X	X	X	X	X	X	12		
Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total																																											
1/01/10	12/31/10	8/01/10	F Filter Changer	X	X	X	X	X	X	X	X	X	X	X	X	12																																											
SO Status: PM - Prev Mat WO Status: Open Maint: Ma Int-Full Coverage Scheduled maintenance for -Maintenance Start Date- thru -Maintenance End Date- Billing Amount: 100.00												Svc: 12 Hours: .00																																															
<b>Contract AMORT</b>												<table border="1"> <tr> <th>Start Date</th> <th>End Date</th> <th>Next Svc Date</th> <th>Labor Grade</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Total</th> </tr> <tr> <td>1/01/07</td> <td>12/31/07</td> <td>7/28/10</td> <td>J Journeyman</td> <td>X</td> <td>12</td> </tr> </table>												Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	1/01/07	12/31/07	7/28/10	J Journeyman	X	X	X	X	X	X	X	X	X	X	X	X	12		
Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total																																											
1/01/07	12/31/07	7/28/10	J Journeyman	X	X	X	X	X	X	X	X	X	X	X	X	12																																											
SO Status: Open WO Status: Open Maint: Ma Int-B illable Maintenance Billing Amount: 100.00												Svc: 12 Hours: .00																																															
<b>Contract CASHCUST</b>												<table border="1"> <tr> <th>Start Date</th> <th>End Date</th> <th>Next Svc Date</th> <th>Labor Grade</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Total</th> </tr> <tr> <td>6/04/09</td> <td>6/04/10</td> <td>7/05/10</td> <td>J Journeyman</td> <td>X</td> <td>12</td> </tr> </table>												Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	6/04/09	6/04/10	7/05/10	J Journeyman	X	X	X	X	X	X	X	X	X	X	X	X	12		
Start Date	End Date	Next Svc Date	Labor Grade	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total																																											
6/04/09	6/04/10	7/05/10	J Journeyman	X	X	X	X	X	X	X	X	X	X	X	X	12																																											
SO Status: Open WO Status: Open Maint: Ma Int-B illable Maintenance Billing Amount: 100.00												Svc: 12 Hours: .00																																															
<b>Totals: 1157 Valley Pak Dr.</b>												<table border="1"> <tr> <td>3</td> <td>- Service Record(s)</td> <td>Svc Count:</td> <td>3</td> <td>36</td> </tr> <tr> <td>3</td> <td>- Contract(s)</td> <td>Hours:</td> <td></td> <td>.00</td> </tr> </table>												3	- Service Record(s)	Svc Count:	3	3	3	3	3	3	3	3	3	3	3	3	3	36	3	- Contract(s)	Hours:														.00		
3	- Service Record(s)	Svc Count:	3	3	3	3	3	3	3	3	3	3	3	3	3	36																																											
3	- Contract(s)	Hours:														.00																																											

Figure 19: Contract Listing - Service

Annual Maintenance Schedule

- [Service Dispatch / Reports / Annual Maintenance Schedule](#)

The Annual Maintenance Schedule provides a hard copy of all maintenance tasks to be performed at a jobsite. It lists basic maintenance tasks for each component, displaying a monthly maintenance schedule, including the task and the labor grade required by the technician to complete the task. This report can be run for repair/service calls, maintenance calls or all calls.

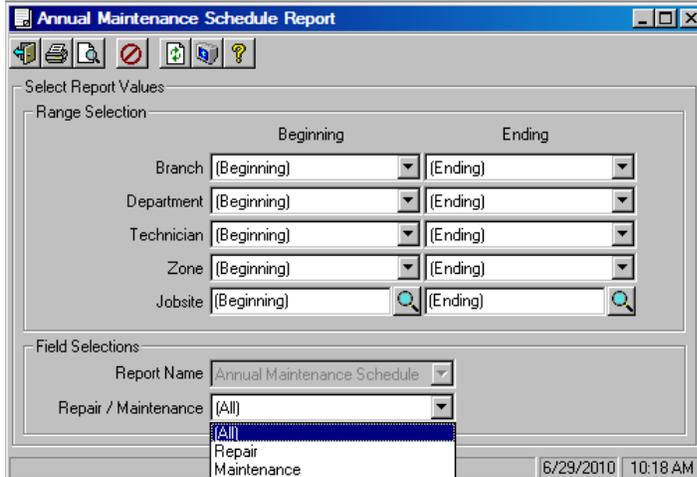


Figure 20: Annual Maintenance Schedule

6/29/10		Continental Products Unlimited				Page 11 of 107											
10:14 am		Annual Maintenance Schedule				Jobsite: Arco 1009											
<b>Branch</b>	AT	Atlanta Branch				<b>Tech</b>											
<b>Jobsite</b>	Arco 1009	<b>Cust Id</b>	Atm053		<b>Zone</b>	AT002											
<b>Name</b>	Arco	Last, First M				<b>Department</b>	Plumbing										
<b>Address</b>	2310 Steve Reynolds		6023 Howard Street		<b>PO Required</b>	No											
	Norcross	GA	Gettysburg		<b>Purchase Order</b>												
	30093	USA	57442		<b>Priority</b>	Regular											
<b>Phone</b>	Primary (770) 565-8889	14	Hank	Primary (605) 489-5023													
	Mobile (770) 568-8877		Hank	Fax (605) 489-5022													
<b>Local ID</b>	Condensor	Condensor	<b>Contract</b>	AC	<b>Start</b>	11/2008 12:00 End 12/31/2008											
	Model TR908700		<b>Serial Number</b>	ADC234													
<b>Manufacturer</b>	Trane		<b>Equipment</b>	Air Compressor	<b>Air Compressor</b>												
<b>Task</b>	<b>Task Description</b>				<b>J</b>	<b>F</b>	<b>M</b>	<b>A</b>	<b>M</b>	<b>J</b>	<b>J</b>	<b>A</b>	<b>S</b>	<b>O</b>	<b>N</b>	<b>D</b>	
91.00	AIR COMPRESSORS/GENERAL				J					J					J		
91.01	...Check & tighten connections				J					J					J		
91.02	...Check all contactors				J					J					J		
91.03	...Check & record voltage_____				J					J					J		
91.04	...Check belts				J					J					J		
91.05	...Check oil level & charge as needed				J					J					J		
91.06	...Check for any leaks				J					J					J		
91.07	...Check filters & replace as needed				J					J					J		
91.08	...Blow down manual/auto drain				J					J					J		
91.09	...Check operation of controls				J					J					J		
<b>Item</b>	<b>Item Description</b>				<b>Quantity</b>	<b>J</b>	<b>F</b>	<b>M</b>	<b>A</b>	<b>M</b>	<b>J</b>	<b>J</b>	<b>A</b>	<b>S</b>	<b>O</b>	<b>N</b>	<b>D</b>
700200	Hinges				1.00	J	J	J	J	J	J	J	J	J	J	J	J

Figure 21: Annual Maintenance Schedule Report

Manpower Requirements

- [Service Dispatch / Reports / Manpower Requirements](#)

The Manpower Requirements reports option is used to print a variety of reports based on budgeted maintenance hours. These reports include:

- Contract Budget Performance
- Open Maint SO by Tech
- PM Hours by Labor Grade
- Scheduled PM Hours by Tech

Contract Budget Performance

This report provides analysis of actual labor used verses estimated hours on maintenance service orders. Use this report to manage your technician's performance and to determine the accuracy of your budgeted labor hours. Totals are provided by Technician, Supervisor and Branch. Service History is read for the range of invoice dates selected to get the actual hours worked. The hours budgets set up on the Jobsite Contracts is used to get the estimated hours.

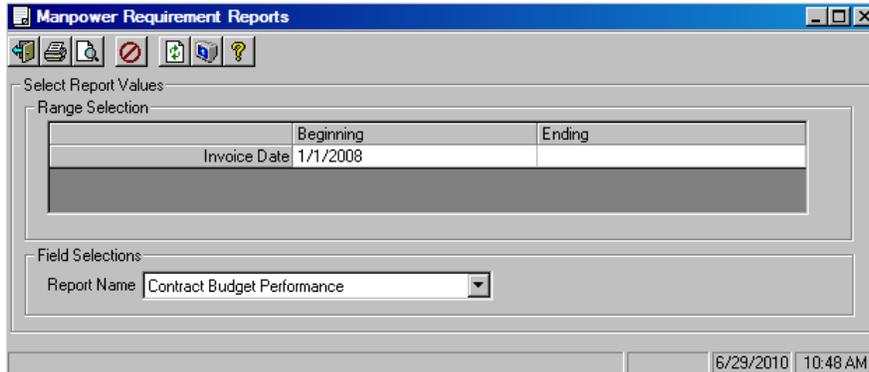


Figure 22: Contract Budget Performance - runtime options.

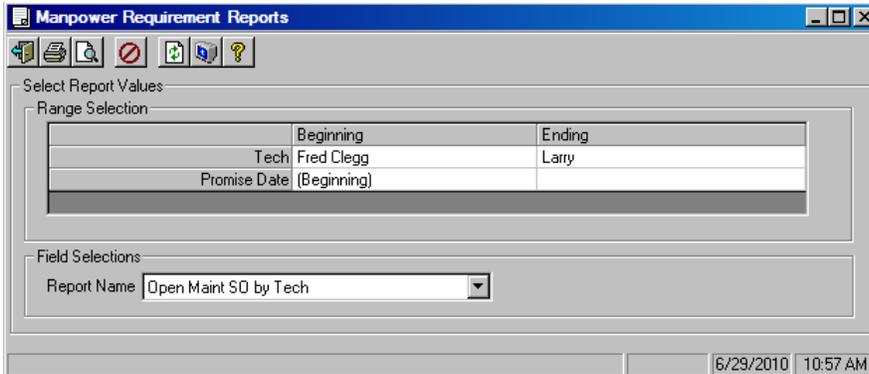
6/30/10 9:00:55AM		Maintenance Budget Performance						Page 1 of 2		
Super	Tech	Name	Service Order	Invoice Date	Jobsite	Jobsite Name	Estimated Hours	Actual Hours	Over Plan	% of Plan
<b>Branch: AT</b>										
			A1129M	1/05/2009	Berkley	Berkley	1.00	10.00	-9.00	
Tech Totals:							1.00	10.00	-9.00	1,000%
Supervisor Totals:							1.00	10.00	-9.00	1,000%
Jeff	John Fixit	John Fixit	A1013M	10/21/2002	TEXACO	TEXACO	.00	6.00	-6.00	
Jeff	John Fixit	John Fixit	A1027M	1/26/2003	TEXACO	TEXACO	.00	5.00	-5.00	
Jeff	John Fixit	John Fixit	A1030M	6/18/2004	TEXACO	TEXACO	4.00	5.00	-1.00	
Jeff	John Fixit	John Fixit	A1033M	3/21/2003	TEXACO	TEXACO	4.00	1.00	3.00	
Jeff	John Fixit	John Fixit	A1034M	6/03/2003	TEXACO	TEXACO	.00	3.00	-3.00	
Jeff	John Fixit	John Fixit	A1038M	10/01/2003	TEXACO	TEXACO	.00	13.00	-13.00	
Tech John Fixit Totals:							8.00	33.00	-25.00	413%
Supervisor Jeff Totals:							8.00	33.00	-25.00	413%
Schmo, Joe	Eric	Eric VonGrenn	A1043M	7/21/2004	TEXACO	TEXACO	2.00	1.00	1.00	
Schmo, Joe	Eric	Eric VonGrenn	A1177M	1/05/2009	Acme Con	Acme Conference Center	1.00	1.50	-.50	
Tech Eric Totals:							3.00	2.50	.50	83%
Schmo, Joe	Eric VonG	Eric VonGrenn	A1005M	7/09/2002	TEXACO	TEXACO	.00	1.00	-1.00	
Tech Eric VonGrenn Totals:							.00	1.00	-1.00	

Figure 23: Contract Budget Performance Report

**Open Maint SO by Tech**

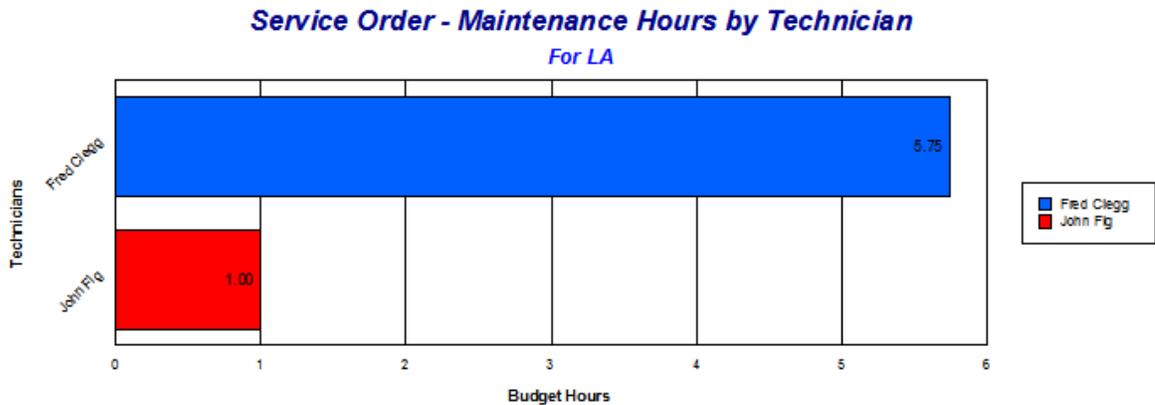
Provides a detailed listing of estimated maintenance hours for existing service orders assigned to a technician for a range of dates. This can be used to determine if a technician can take on more work, or if their schedule is full. Totals are provided by Technician, Supervisor and Branch. Open Service Calls are read for the range of promise dates selected to get the scheduled jobs. The hours budgets set up on the Jobsite Contracts is used to get the estimated hours.

Run this report to see how many maintenance service orders exist that have not been invoiced. This will sort by supervisor and technician. Use this to manage your maintenance service orders.



**Figure 24: Open Maint SO by Tech - runtime options**

SuperVisor	Tech	Tech Name	Promise Date	Jobsite	Jobsite Name	Service Order	Budget Hours	SO's
<b>Branch: LA</b>								
Schmo, Joe	Fred Clegg	Fred W. Clegg	4/22/2004	8055 Washin:	Smith, Harry	LA200018M	3.75	
			7/1/2004	21ST CENTU	21ST CENTURY PREPA	LA200028M	1.00	
			7/1/2004	8055 Washin:	Smith, Harry	LA200030M	1.00	
<b>Tech Fred Clegg Totals:</b>							<b>5.75</b>	<b>3</b>
Schmo, Joe	John Fig	John Fig	1/18/2004	20 Centerpoir	Compusource Corp	LA200024M	1.00	
<b>Tech John Fig Totals:</b>							<b>1.00</b>	<b>1</b>
<b>Supervisor Schmo, Joe Totals:</b>							<b>6.75</b>	<b>4</b>
<b>Branch LA Totals:</b>							<b>6.75</b>	<b>4</b>



**Figure 25: Open Maint SO by Tech Report**

PM Hours by Labor Grade

Provides an overview of the hours budgeted for each month of the year for maintenance work, grouped by labor grade (ie, Apprentice, Journeyman, etc.). This can be used to determine work loads by month and labor grade. Totals are provided by Labor Grade and Branch. The hours budgets set up on the Jobsite Contracts is used to get the estimated hours.

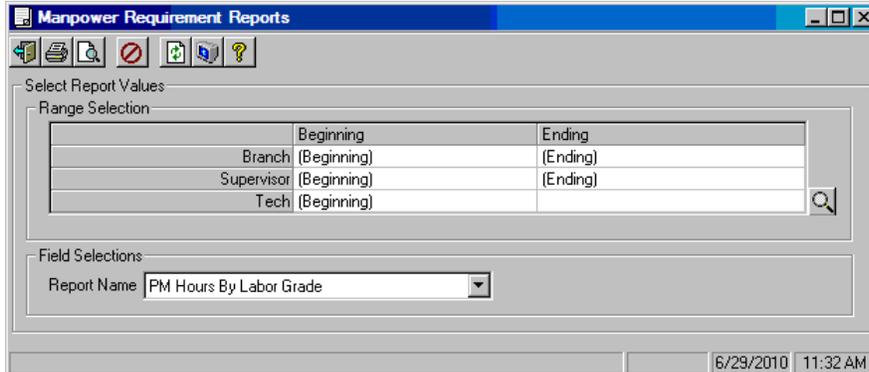


Figure 26: PM Hours by Labor Grade - runtime options

6/29/10 2:49 pm		Continental Products Unlimited												Page 1 of 1		
PM Hours By Labor Grade																
Labor Grade	Technician	Jobsite	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg Mnth	Total
<b>Branch: AT Atlanta Branch</b>																
A	Eric	Acme Conference Cent	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
A	Eric	Arco 1009	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<b>Labor Grade A Totals:</b>			<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>
J	Eric	TEXACO	.00	.15	.00	.00	.00	.00	.00	.00	.00	.00	1.50	.00	.14	1.65
J	Eric	TEXACO	1.00	.00	.00	1.00	.00	1.00	.00	1.00	.00	1.00	.00	.00	.33	4.00
J	Eric	TEXACO	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	24.00
J	Eric	TEXACO	.00	.00	4.00	4.00	.00	.00	4.00	.00	.00	.00	.00	.00	1.00	12.00
<b>Labor Grade J Totals:</b>			<b>3.00</b>	<b>2.15</b>	<b>6.00</b>	<b>7.00</b>	<b>2.00</b>	<b>3.00</b>	<b>6.00</b>	<b>2.00</b>	<b>3.00</b>	<b>2.00</b>	<b>3.50</b>	<b>2.00</b>	<b>3.47</b>	<b>41.65</b>
<b>Branch AT Totals:</b>			<b>3.00</b>	<b>2.15</b>	<b>6.00</b>	<b>7.00</b>	<b>2.00</b>	<b>3.00</b>	<b>6.00</b>	<b>2.00</b>	<b>3.00</b>	<b>2.00</b>	<b>3.50</b>	<b>2.00</b>	<b>3.47</b>	<b>41.65</b>
<b>Branch: LA Los Angeles County</b>																
J	Eric	ARBORS	3.00	.00	.00	3.00	.00	.00	3.00	.00	.00	3.00	.00	.00	1.00	12.00
<b>Labor Grade J Totals:</b>			<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>1.00</b>	<b>12.00</b>
<b>Branch LA Totals:</b>			<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>1.00</b>	<b>12.00</b>
<b>Branch: RV Riverside County</b>																
A	Eric	KFC	.00	2.00	.00	.00	2.00	.00	.00	2.00	.00	.00	2.00	.00	.67	8.00
<b>Labor Grade A Totals:</b>			<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.67</b>	<b>8.00</b>
<b>Branch RV Totals:</b>			<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>.67</b>	<b>8.00</b>
<b>Grand Totals:</b>			<b>6.00</b>	<b>4.15</b>	<b>6.00</b>	<b>10.00</b>	<b>4.00</b>	<b>3.00</b>	<b>9.00</b>	<b>4.00</b>	<b>3.00</b>	<b>5.00</b>	<b>5.50</b>	<b>2.00</b>	<b>5.14</b>	<b>61.65</b>

Figure 27: PM Hours by Labor Grade Report

Scheduled PM Hours By Tech

Provides an overview of the hours budgeted for each month of the year for maintenance work, grouped by Branch and Technician. This can be used to determine work loads by month and technician. Totals are provided by Branch and Technician. The hours budgets set up on the Jobsite Contracts [Service] tab is used to get the estimated hours.

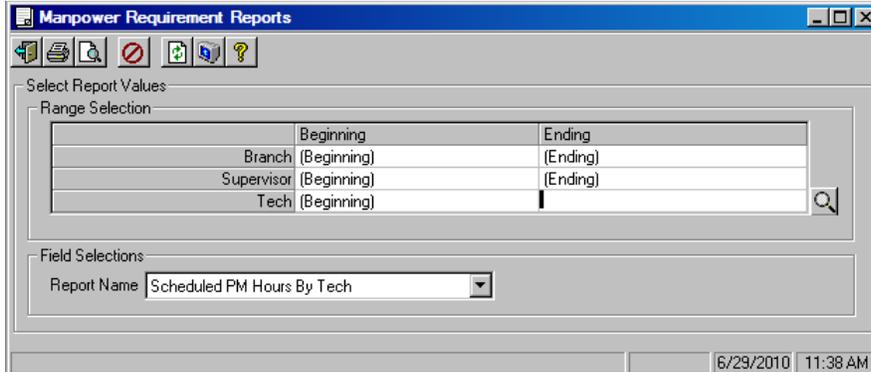


Figure 28: Scheduled PM Hours by Tech - runtime options

6/29/10 2:37 pm		Continental Products Unlimited Scheduled PM Hours By Technician												Page 1 of 2
Super- visor	Zone	Jobsite Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Branch: AT</b>		<b>Atlanta Branch</b>												
<b>Tech: Brad Graham</b>		<b>Brad Graham</b>												
Smith, M	AT002	Arco	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<b>Totals for: Brad Graham</b>			<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>
<b>Tech: Eric</b>		<b>Eric VonGrenn</b>												
Schmo, J	AT002	Acme Conference Center	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Schmo, J	AT002	Arco	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Schmo, J	LA001	TEXACO	.00	.15	.00	.00	.00	.00	.00	.00	.00	.00	1.50	.00
Schmo, J	LA001	TEXACO	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Schmo, J	LA001	TEXACO	.00	.00	4.00	4.00	.00	.00	4.00	.00	.00	.00	.00	.00
Schmo, J	LA001	TEXACO	1.00	.00	.00	1.00	.00	1.00	.00	.00	1.00	.00	.00	.00
<b>Totals for: Eric</b>			<b>3.00</b>	<b>2.15</b>	<b>6.00</b>	<b>7.00</b>	<b>2.00</b>	<b>3.00</b>	<b>6.00</b>	<b>2.00</b>	<b>3.00</b>	<b>2.00</b>	<b>3.50</b>	<b>2.00</b>
<b>Tech: Fred Clegg</b>		<b>Fred W. Clegg</b>												
Schmo, J	LA001	TEXACO	2.00	.00	.00	.00	.00	.00	2.00	.00	2.00	2.00	.00	2.00
Schmo, J	LA001	TEXACO	4.00	.00	4.00	.00	.00	.00	.00	.00	.00	.00	2.00	.00
<b>Totals for: Fred Clegg</b>			<b>6.00</b>	<b>.00</b>	<b>4.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>2.00</b>	<b>.00</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>
<b>Tech: John Fig</b>		<b>John Fig</b>												
Schmo, J	LA001	TEXACO	3.00	.00	.00	.00	3.00	.00	.00	.00	.00	.00	3.00	.00
Schmo, J	LA001	TEXACO	10.00	10.00	.00	10.00	.00	.00	.00	.00	.00	10.00	10.00	.00
<b>Totals for: John Fig</b>			<b>13.00</b>	<b>10.00</b>	<b>.00</b>	<b>10.00</b>	<b>3.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>.00</b>	<b>10.00</b>	<b>13.00</b>	<b>.00</b>
<b>Tech: Robert</b>		<b>Robert Arce</b>												
Smith, M	LA001	TEXACO	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Totals for: Robert</b>			<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>
<b>Branch Totals for: AT</b>			<b>23.00</b>	<b>13.15</b>	<b>11.00</b>	<b>18.00</b>	<b>6.00</b>	<b>4.00</b>	<b>9.00</b>	<b>3.00</b>	<b>6.00</b>	<b>15.00</b>	<b>19.50</b>	<b>5.00</b>

Figure 29: Scheduled PM Hours by Tech Report

Expired Contracts

- [Service Dispatch / Reports / Expired Contracts](#)

The Expired Contract Reports lists all jobsites that have contracts expiring in a given month. These reports can be used as a management tool to address these contracts that are about to expire.

- Expired Contracts
- Expired Contracts with Phone Information

Expired Contracts

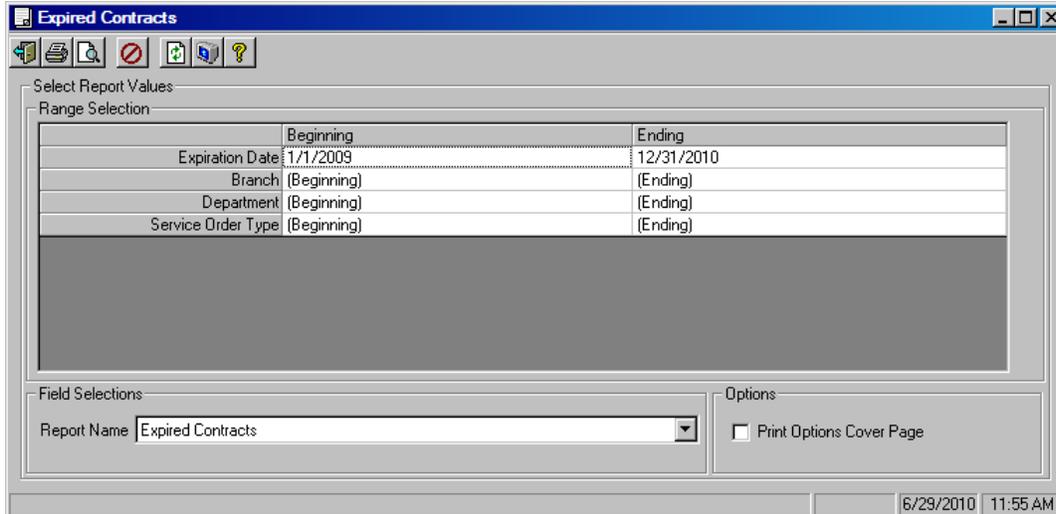


Figure 30: Expired Contracts - runtime options

Jobsite Name	Contract	Cust ID	End Date	SO Type	Maint Amt	Billing Freq
<b>Branch Name AT</b>						
<b>Department Air Conditioning</b>						
Acme Conference Center	AC-FC	AcmeIntl	12/31/09	Air Conditioning	100.00	Monthly
<b>Air Conditioning</b>				<b>1 Department Records Printed</b>		
<b>AT</b>				<b>1 Branch Records Printed</b>		
<b>Branch Name LA</b>						
<b>Department Air Conditioning</b>						
Scott, Troy	AC	(Cash)	12/31/10	Heating	300.00	Quarterly
Scott, Troy	CASHCUST	(Cash)	6/4/10	Air Conditioning	100.00	
<b>Air Conditioning</b>				<b>2 Department Records Printed</b>		
<b>LA</b>				<b>2 Branch Records Printed</b>		
<b>Branch Name OR</b>						
<b>Department Plumbing</b>						
Fullerton City Hall	HVAC	(Cash)	12/31/10	Plumbing	100.00	Monthly
<b>Plumbing</b>				<b>1 Department Records Printed</b>		
<b>OR</b>				<b>1 Branch Records Printed</b>		
<b>Grand Total:</b>				<b>4 Records Printed</b>		

\*\*\*End of Report\*\*\*

Figure 31: Expired Contracts Report

Expired Contracts with Phone Information

This can be used to call the jobsites with expiring maintenance contracts to try and get them to extend their maintenance contract.

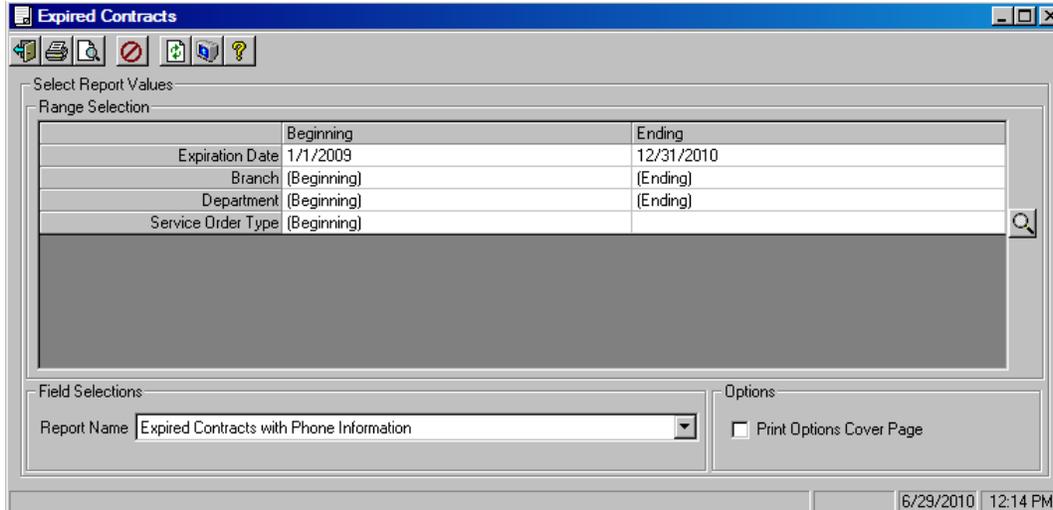


Figure 32: Expired Contracts with Phone Information - runtime options

JobsiteName	Contract	Cust ID	Start Date	End Date	SO Type
6/29/10 12:53PM <span style="float: right;">Page 1 of 1</span>					
<b>Continental Products Unlimited</b> Expired Contracts with Phone Information					
<hr/>					
<b>Branch Name AT</b>					
<b>Department Air Conditioning</b>					
Acme Conference Center	AC-FC	AcmeIntl	1/1/09	12/31/09	Air Conditioning
JS Ph 1: Primary	(770) 562-3144	Jeff		Cust Ph: (323) 544-6466	
JS Ph 2: Fax	(770) 562-1555			JS Ph 3:	
<hr/>					
Air Conditioning <b>1 Department Records Printed</b>					
AT <b>1 Branch Records Printed</b>					
<b>Branch Name LA</b>					
<b>Department Air Conditioning</b>					
Scott, Troy	AC	(Cash)	1/1/10	12/31/10	Heating
JS Ph 1: Primary	(213) 444-5555	Susie		Cust Ph: (111) 111-1111 DO NOT DELETE!	
JS Ph 2: Mobile	(213) 889-0765	Susie		JS Ph 3:	
<hr/>					
Scott, Troy	CASHCUST	(Cash)	6/4/09	6/4/10	Air Conditioning
JS Ph 1: Primary	(213) 444-5555	Susie		Cust Ph: (111) 111-1111 DO NOT DELETE!	
JS Ph 2: Mobile	(213) 889-0765	Susie		JS Ph 3:	
<hr/>					
Air Conditioning <b>2 Department Records Printed</b>					
LA <b>2 Branch Records Printed</b>					

Figure 33: Expired Contracts with Phone Information Report

Label Printing

- [Service Dispatch / Reports / Label Printing](#)

The labels are designed to print on Avery 5160 3-across laser labels. Labels are always sorted by postal code.

NOTE: All labels will print the Jobsite address information with the exception of the Maintenance Contract Labels - Expired. In this case the system will print the bill to customer address, unless it is the (Cash) customer, in which case the Jobsite address information will be printed. We always recommend printing the labels to plane paper in order to verify alignment before printing on the labels.

- Maintenance Contract Labels – Expired (5160)
- Maintenance Contract Labels (5160)

Maintenance Contract Labels – Expired (5160)

These can be used to mail postcards or letters to try to extend their maintenance contract.

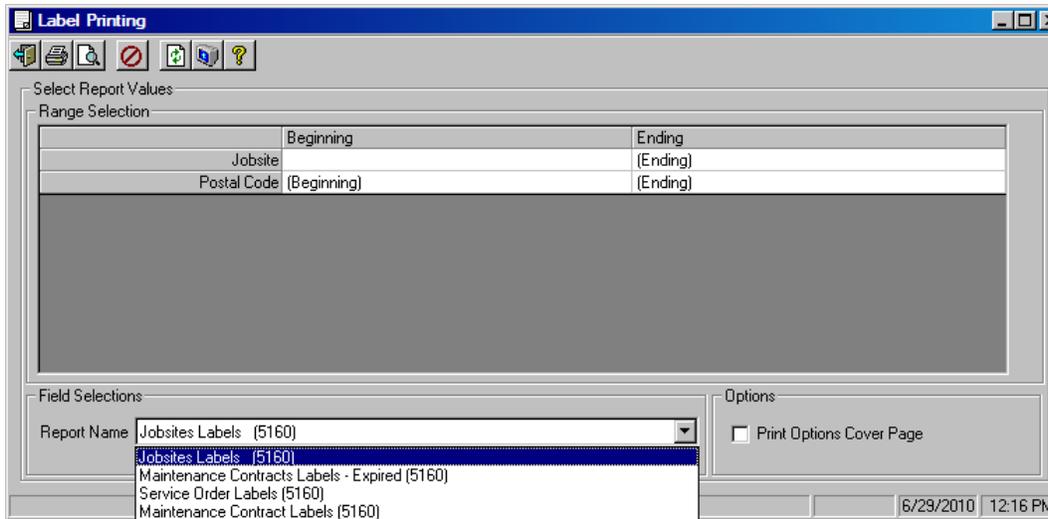


Figure 34: Maintenance Contract Labels - Expired (5160) - runtime options

msr  
123 main  
Lakewood, CA

Weurding, John  
890 Elm St  
Woodstock, GA 30188

Wesley Building  
1200 Slauson Ave  
LOS ANGELES, CA 90023

InterMicro  
185 Commerce Center  
Unit 1  
Greenville, SC 29615

Berkley  
123 Jasmine Way  
Charleston, SC 31010

Smith, Harry  
6055 Washington Blvd.  
CITY OF COMMERC, CA 90040

Rubble, Barney  
3622 Braselton  
Dacula, GA 30019

Jake Mars hall  
611 Manning  
Chattanooga, TN 37405

Nicholson, Jack  
1231 Main St  
Beverly Hills, CA 90210

Smith, Harold  
234 Main St  
Dacula, GA 30019

THE ARBORS  
Lee Highway and 100th St  
CHATTANOOGA, TN 37421

AIRBORNE EXPRESS CHA-145  
321 Center Ave  
GARDENA, CA 90247

Figure 35: Maintenance Contract Labels - Expired (5160)

Maintenance Contract Labels (5160)

These can be used to for marketing or file folders.

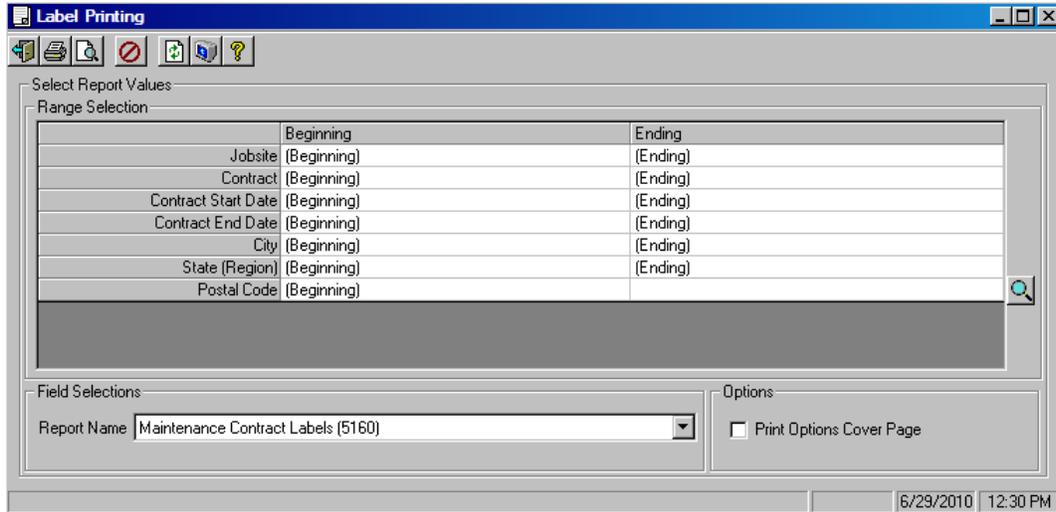


Figure 36: Maintenance Contract Labels (5160) – runtime options

Jones, Sally  
1033 Winchester Dr  
BELLFLOWER, CA 90706

Smith, Richard  
234 Elm St  
LA PALMA, CA 90623

THE ARBORS  
Lee Hifghway and 100th St  
CHATTANOOGA, TN 37421

Benion, James  
1080 Elm St  
Unit 104  
FULLERTON, CA 92831

Smith, Harry  
6055 Washington Blvd.  
CITY OF COMMERC, CA 90040

Arco  
2310 Steve Reynolds  
Norcross, GA 30093

Scott, Troy  
1157 Valley Pak Dr.  
LOS ANGELES, CA 90021

Levesque, David  
87654 Elm St  
FULLERTON, CA 92835

Berkley  
123 Jasmine Way  
Charleston, SC 31010

Scott, Troy  
1157 Valley Pak Dr.  
LOS ANGELES, CA 90021

Baker, Ken  
916 Beachwood Ave  
ANAHEIM, CA 92850

Dupe 1  
1 Dupe Street  
IRVINE, CA 92603

Figure 37: Maintenance Contract Labels (5160)