



Breakdowns

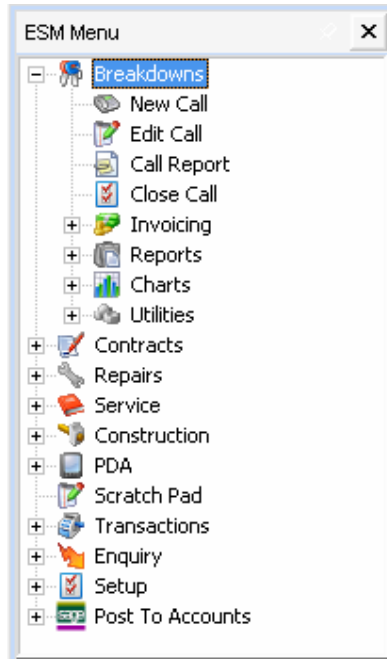
Contents

- 1. Breakdown Module 1
 - 1.1 Calls 2
 - 1.1.1 New Call 2
 - 1.1.2 Edit Call 5
 - 1.1.3 Close Call 7
 - 1.2 Invoices..... 10
 - 1.2.1 Process Single Invoices..... 10
 - 1.2.2 Process Group Invoices..... 12
 - 1.3 Utilities 13
 - 1.3.1 Call Enquiry..... 13
 - 1.3.2 Call Manager..... 14
 - 1.3.3 Change Call Status 16
 - 1.3.4 Delete Completed Calls 17
 - 1.3.5 Complete Calls by Batch..... 17

1. Breakdown Module

This module contains all the programs required to input, edit and invoice breakdowns. It covers the process of creating a new call and processing it through its relevant stages. It also allows you to input and log ad-hoc fault reports for elevators which fall outside of the normal services schedule.

The Breakdown module is accessible via the main ESM menu bar or by displaying the individual breakdown toolbar.



Or



1.1 Calls

1.1.1 New Call

To add a New Call open the Breakdown module and select New Call from the tool bar.

The screenshot shows a 'New Call' window with the following fields and controls:

- Call No: 8105
- Elevator: [Search icon] [Input field] [Search icon]
- Client: [Input field]
- Client Ref: [Input field]
- Call Date: 30/01/07
- Time: 09:35
- Response Time: [Input field]
- Site: [Input field]
- Cont No: [Input field]
- Type: [Input field]
- Site Address: [Input field]
- Elevator Notes: [Text area]
- Fault Details: [Input field] [Search icon] Lift Out Of Order
- Order No: [Input field]
- Contact Details: [Input field]
- Engineer: [Input field] [Search icon]
- Eng. Notified: [Input field] [Search icon] Time: [Input field]
- Last Call: [Input field] [History button]
- Priority: Normal
- Night Call: [checkbox]
- Misus: [checkbox]
- Non Chargeable: [checkbox]
- Set By: [Input field] Time: [Input field]
- Out Of Service: [checkbox]
- Set By: [Input field] Time: [Input field]
- Buttons: New, Log, Save, Cancel, Exit

The following fields on the form are described:

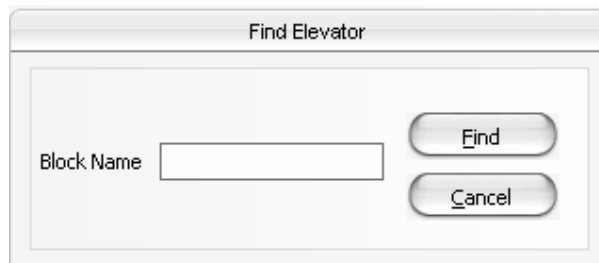
1. **New Button:** Select this button to add a new call. A new call number will be generated.
2. **Call Number:** The program gathers the last call number used and increments the value by 1. The call number is always unique and a duplicate number is not allowed.
3. **Elevator Code:** A valid elevator code must be input, you can either enter the elevator code directly, which will populate the client and site details or you can search for an elevator by its site name using the search button provided. In the search field, leave blank to search for all elevators, or use a partial string which will show all the possible alternatives, from this list you can select the desired elevator or cancel to return to the new call form.
4. **Call Date:** Automatically defaults to the current date but can be amended. To speed up input, the year will auto-complete if you only enter (dd/mm).
5. **Call Time:** Automatically defaults to the current time. There is no validation on this field but it does conform to a standard 24-hour date format.
6. **Response time:** is the time agreed between yourself and your client and is information for your support team.
7. **Fault details:** This is a compulsory field. A search button activates a text search facility for the fault code. Once you have selected the fault code the fault text is displayed in the description field. These details can be edited to a maximum of 255 characters.

8. **Order No:** This is a compulsory field, shown on the invoice layout as an elevator reference.
9. **Contact Details:** Is the name of the person reporting the call.
10. **Engineer:** A valid engineer code must be entered. A search button that activates an engineer list is provided. The engineers name will be displayed once you have selected the engineer code from either the list or entering a valid code.
11. **Engineer Notified:** To be entered to show when the engineer has been notified. This consists of a date and a time.
12. **Last Call:** Will show the last time an engineer attended this elevator by clicking on the 'Info' button it will reveal the full details for that call.
13. **Night Call:** Check box, reference purposes only.
14. **Misuse:** This box is ticked if the contract is Comprehensive but the fault was caused by vandalism for example. Then an invoice will be raised.
15. **Non Chargeable:** This box is ticked if an invoice is not required for what ever reason. When this box is ticked it will fill in the two fields below with the name of the person inputting and the current date and time.
16. **Out of Service:** When this box is ticked it will again fill in the two fields below with the name of the person inputting and the current date and time
17. **Save Button:** Once you have input the new call you can save it. If you select the save button you are prompted to save the new call, select 'yes' to save or 'no' to go back and amend the record.
18. **Cancel Button:** Selecting this will abort the new call record. You are prompted to continue. Select yes to continue, select No to amend the new call record.

NOTE: Whilst a new call record is active you cannot close the new call form. You must either select the save or cancel button first. This is done to ensure data integrity.

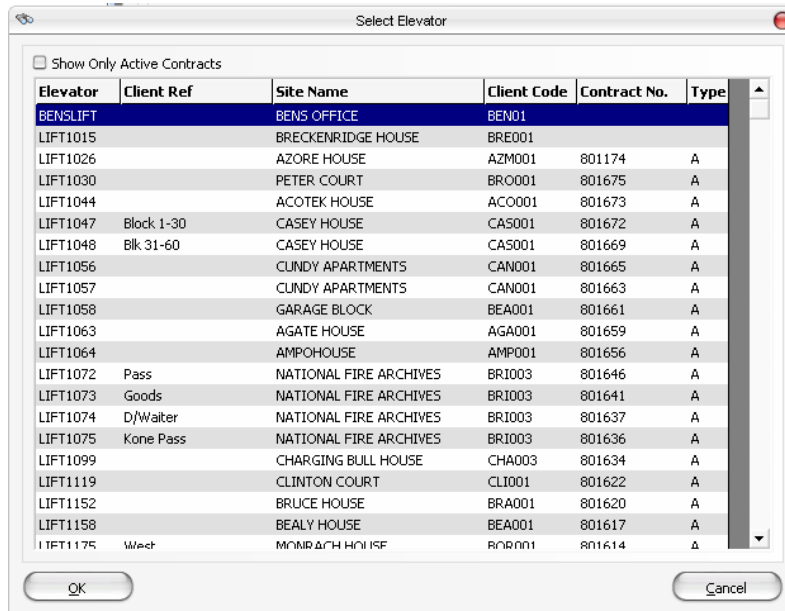
To create a new call:

1. Double click on "New Call"
2. Press the elevator code search button Enter in a partial site name, for example "COM" (this will show all the completions for clients starting with "COM" on the next screen), or leave blank to show all elevators.

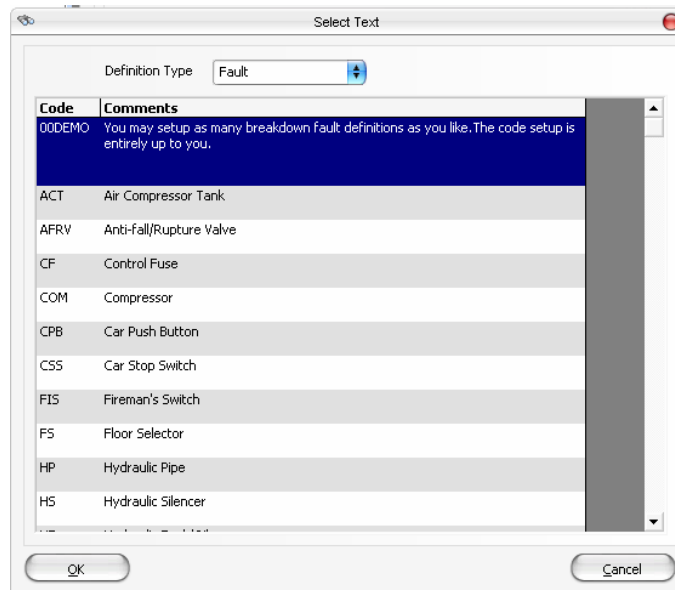


The image shows a software dialog box titled "Find Elevator". It contains a text input field on the left with the label "Block Name" and a cursor inside. To the right of the input field are two buttons: "Find" and "Cancel". The dialog box has a standard Windows-style title bar and a light gray background.

3. Select the desired elevator from the list, and click on OK.



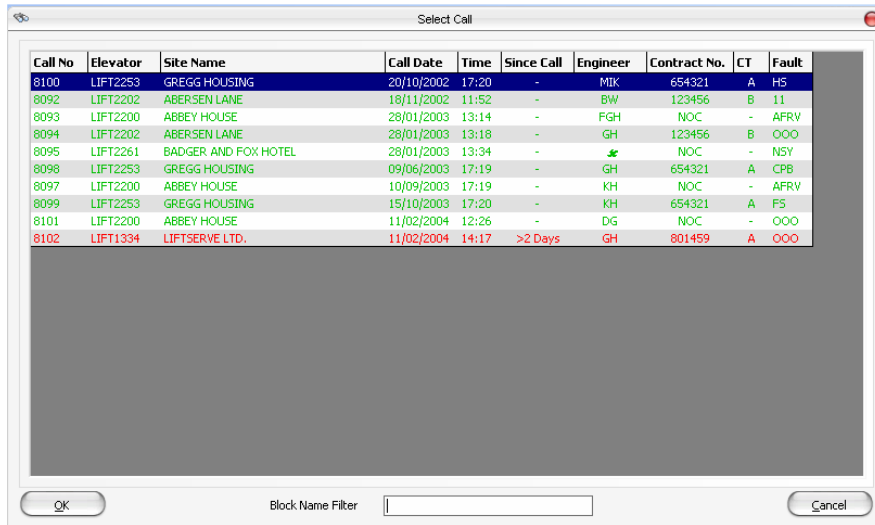
4. Set the call out date, if we do not want to use today's date.
5. Pick the fault text using the fault text button (next to the fault code text box). Select the appropriate fault code from the list, and click on OK.



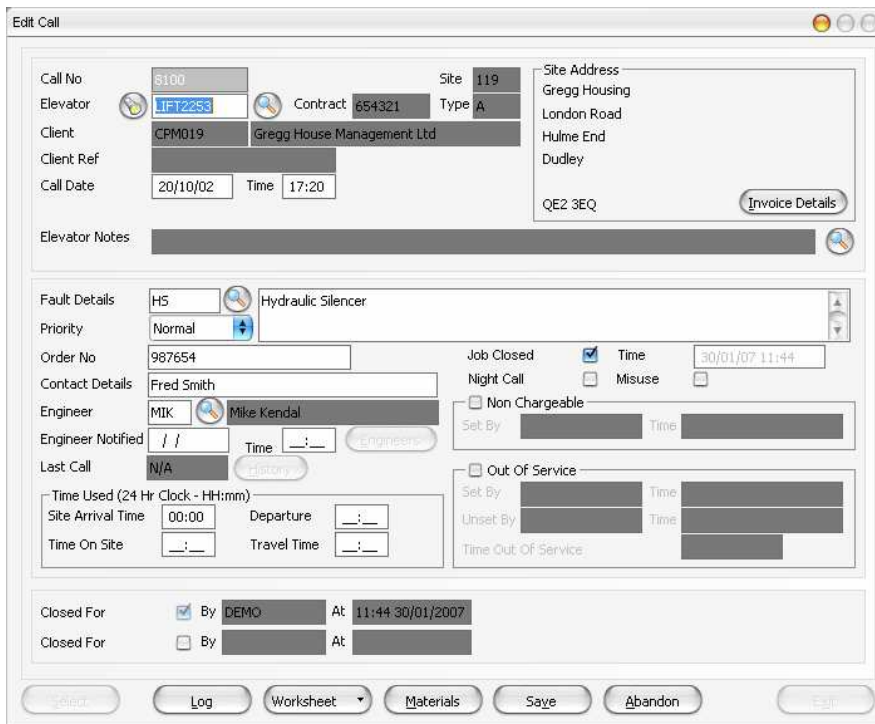
6. Enter an order number.
7. Enter in the contact details.
8. Pick an engineer for this callout by using the engineer list button, which is next to the engineer code text box.
9. Click 'Save' to finalise this call out, or 'Cancel' to abandon

1.1.2 Edit Call

To edit a call open the Breakdown module and select Edit Call from the tool bar.



Highlight the required call if it is on the list, or use the block name filter to sort the list by the client to make it easier to find.



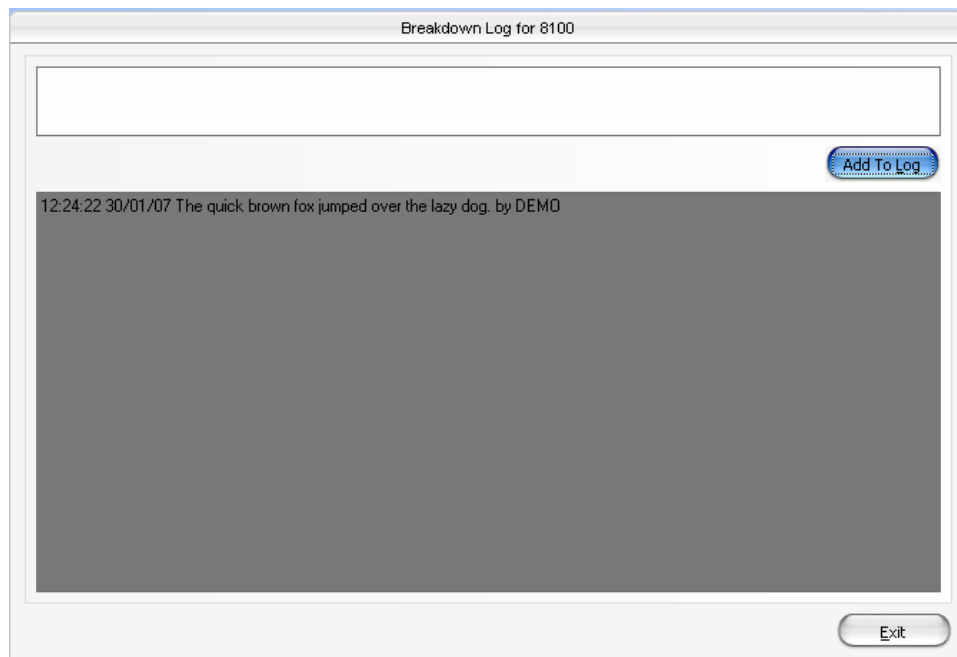
It is now possible to change any of the details regarding this breakdown including logging additional information against the call.

1.1.2.1 Logging additional details to a call

Click on the “log” button within the edit call screen.



Add any additional information into the free text field at the top of the window, and click on “add to log”.

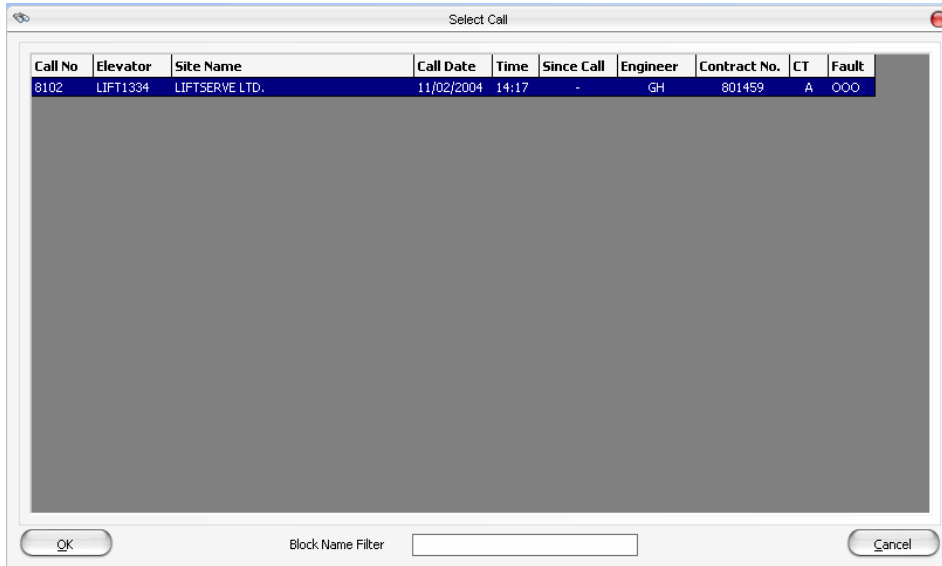


The information is added along with tracking information.

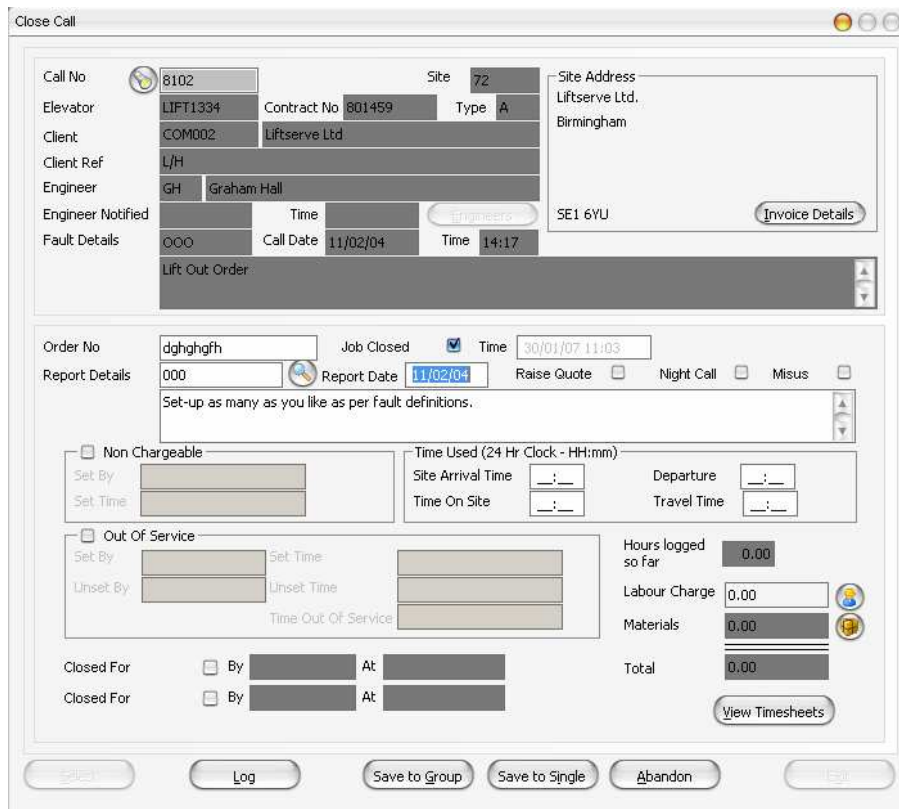
NOTE: You must click on the save button on the main edit call window for the logged information to be saved.

1.1.3 Close Call

Open the Breakdown Module and select 'Close Call'.



To process the call it must be cleared with the necessary documents providing an engineer report. Select the call to process by double clicking on it or highlight and click 'OK'.



The following fields appear on the form:

1. **Report Date:** Input the engineers report date. A valid date is required.
2. **Report details:** This is a compulsory field. A search button that activates a text search facility is provided. Once you have selected the report code the text derived from the pre-defined text definition is displayed in the report details field. The field may be amended.
3. **Order No:** This field can be amended.
4. **Raise Quote:** This will allow the raising of a quotation.
5. **Out of Service:** If this is selected then the two fields below will be populated with the person's information that is amending the call sheet.
6. **Non Chargeable:** If this box is checked then no invoice will be raised and the following two fields will be populated with the name of the person entering the details and date and time the call was updated.
7. **Misuse:** If this box is checked then an invoice will be raised, this will only be used for comprehensive contracts.
8. **Night Call:** This field can be amended.
9. **Labour Charge:** Numeric currency field. The labour charge can be calculated by using the button next to it, where you can allocate the amount of time an engineer has spent relating to the rate for that period. This identifies the cost element.

Rate No	Description	Rate	Per	Units	Labour Chrg
1	Between 8:00 - 18:00	46.00	Hour	0.00	0.00
2	After 18:00 & Saturdays	71.00	Hour	0.00	0.00
3	Sundays & Bank Holidays	99.00	Hour	0.00	0.00
4	Special Rate	0.00	Hour	0.00	0.00

Contract Notes

Total 0.00

Exit

10. **Total materials:** Numeric currency field. The materials charge can be calculated by using the button next to it, where you can allocate the amount of materials relating to the repair. This field identifies the cost element.

Supplier Code : Part Number	Qty	Item Cost	Margin	Total Charge
-----------------------------	-----	-----------	--------	--------------

Total £0.00
Margin £0.00
Grand Total £0.00

Add Item Edit Item Remove Item Close

11. **Total:** The Total charge will display the total of the labour and materials charges fields.
12. **Save to Single/Group Button:** Select the Save to Single button to keep any changes you have made. If there is a call out charge the program will allocate the next invoice number and the call will be ready to be invoiced. If there is no call out charge the call will be completed and no further action is required. If the Save to Group button is selected this will show the invoice to be allocated to the Group select the invoice required click on the select button and the window will close. You are prompted to continue. Select yes to continue, select no to abandon any changes. At this point you are also prompted whether or not to raise an invoice.
13. **Abandon Button:** Select this button to abandon any changes you have made. You are prompted to continue. Select Yes to continue, select No to amend the changes.
14. **Select Button:** If you require to process further calls then select the option to input a call number. A valid call number must be input here. Once you have selected a call the relevant call record will be displayed. You will note several fields from the new call and edit call forms will be display only. If you need to change any of these fields you will need to abandon the record. It is not possible to process a call where an engineer is not allocated; a warning message will be displayed. It is possible to select a call where an invoice number has been allocated, a prompt to continue will be displayed, select Yes to process the call, select No to cancel

1.2 Invoices

1.2.1 Process Single Invoices

Open the Breakdown module and select Single Invoices from the tool bar.



Select this option to produce invoices. Once the form is activated a list of repairs ready to be invoiced are displayed. There are two lists, not selected and selected; the program will produce invoices for repairs displayed in the selected list only. The program functions as follows:

1. **All Buttons:** select this button to put all the invoices in one list. A Button is available for each list.
2. **Add Buttons:** select this button to toggle the highlighted invoice from the current list to the other. You may also use the mouse to double click on the highlighted invoice, or use the enter key to toggle.
3. **Sort Button:** select this option to sort both lists in invoice number sequence.
4. **Preview Button:** select this option to activate a preview window of the invoice layout. A prompt displays the number of invoices ready to print, select Yes to continue, No to abort. Only invoices in the selected list are processed.
5. **Print Invoices Button:** this option outputs the invoices to the printer. Only one copy is printed. A prompt displays the number of invoices ready to print, select Yes to continue, No to abort. Only invoices in the selected list are processed.
6. **Printed OK Button:** once the invoices have been printed and checked select this option to complete the print process. The process will update the status of the invoice to 'invoice is printed' and will be ready to be posted to the accounts. Only invoices that have been printed and are displayed in the selected list will be updated. A prompt displays the number of invoices ready to complete, select Yes to continue, No to

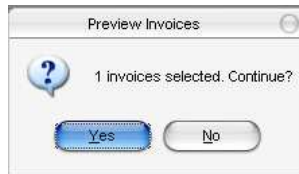
abort. On completion of the process the records updated will be cleared from the selected list.

To process a single invoice:

1. Select the invoices on the left and add them as appropriate using the "Add >" button, this will add individual items to be printed.



2. Click the "Preview" button to check the invoices.

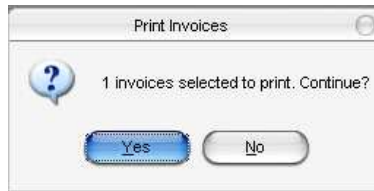


The following report will be displayed as a preview of the invoice to be sent out.

Description Of Work		Value												
<p>ESM</p> <p>LIFserve Ltd LIFserve House 346 The Great Road Epsom London JL4 5PB Attn: Mr B. Chaseman</p>														
<table border="1"> <thead> <tr> <th colspan="2">INVOICE</th> </tr> </thead> <tbody> <tr> <td>Invoice Number</td> <td>20685</td> </tr> <tr> <td>Invoice Date</td> <td>30 /01 /2007</td> </tr> <tr> <td>Your Ref</td> <td>DS4HG1614</td> </tr> <tr> <td>Acc. Ref</td> <td>EDM002</td> </tr> <tr> <td>S/L Acc. No</td> <td>EDM002</td> </tr> </tbody> </table>			INVOICE		Invoice Number	20685	Invoice Date	30 /01 /2007	Your Ref	DS4HG1614	Acc. Ref	EDM002	S/L Acc. No	EDM002
INVOICE														
Invoice Number	20685													
Invoice Date	30 /01 /2007													
Your Ref	DS4HG1614													
Acc. Ref	EDM002													
S/L Acc. No	EDM002													
Our Ref No.	8102/LIFT1334													
Elevator Site	LIFserve Ltd													
Attended Call On	11 February 2004													
Fault Reported	LIFT Out Order													
Your Elevator Ref	LH													
Set-up as many as you like as per fault definitions.														
	Total Labour	£0.00												
	Materials	£4.04												
	Total Net	£4.04												
	Total VAT	£0.71												
	Invoice Total	£4.75												

Close the ESM Crystal report reader.

3. Click the "Print Invoices" button to send the Invoices to the printer.



4. Once printed, click the "Printed OK" button. This will send the invoices to 'Ready for Posting'.



1.2.2 Process Group Invoices

Open the Breakdown module and select Group Invoices from the tool bar.

The processing of group invoices acts in the same way as single invoices except that groups of breakdowns will appear on a single physical invoice. This will have been determined at the point at which the breakdown was closed and the user selected either single or group invoices. Group invoices can only be processed if valid groups have already been set up within the system for the breakdowns to have been allocated.

1.3 Utilities

1.3.1 Call Enquiry

Open the Breakdown Module click on Utilities in the tool bar then select Call Enquiry.

The screenshot shows the 'Call Enquiry' window with the following fields and sections:

- Call Information:** Call No, Elevator, Client, Client Ref, Call Date, Contract, Site, Type, Site Address.
- Fault Details:** Fault Details, Priority, Order No, Contact Details, Engineer, Engineer Notified, Last Call, Report Code, Report Date, Report Details.
- Job Status:** Job Closed, Night Call, Non Chargeable, Out Of Service.
- Time Tracking:** Time, Set By, Unset By, Time Out Of Service, Time Used (24 Hr Clock - HH:mm), Site Arrival Time, Departure, Time On Site, Travel Time.

Buttons at the bottom: Select, Log, Clear, Exit.

Click on the magnifying glass next to the Call Number field, a 'Find' window will appear from this select the site required see window below.

Elevator Service Manager® - Version 6

Call No	Elevator	Site Name	Call Date	Time	Since Call	Engineer	Contract No.	CT	Fault
8100	LIFT2253	GREGG HOUSING	20/10/2002	17:20	-	MIK	654321	A	HS
8092	LIFT2202	ABERSEN LANE	18/11/2002	11:52	-	BW	123456	B	11
8093	LIFT2200	ABBEY HOUSE	28/01/2003	13:14	-	FGH	NOC	-	AFRV
8094	LIFT2202	ABERSEN LANE	28/01/2003	13:18	-	GH	123456	B	OOO
8095	LIFT2261	BADGER AND FOX HOTEL	28/01/2003	13:34	-	GH	NOC	-	NSY
8098	LIFT2253	GREGG HOUSING	09/06/2003	17:19	-	GH	654321	A	CPB
8097	LIFT2200	ABBEY HOUSE	10/09/2003	17:19	-	KH	NOC	-	AFRV
8099	LIFT2253	GREGG HOUSING	15/10/2003	17:20	-	KH	654321	A	FS
8101	LIFT2200	ABBEY HOUSE	11/02/2004	12:26	-	DG	NOC	-	OOO
8102	LIFT1334	LIFTSERVE LTD.	11/02/2004	14:17	>2 Days	GH	801459	A	OOO

The following window will now show all details of that call.

Call No	8100	Site	119	Site Address	Gregg Housing
Elevator	LIFT2253	Contract	654321	Type	A
Client	CPM019	Gregg House Management Ltd			
Client Ref					
Call Date	20/10/02	Time	17:20	Hulme End Dudley	
QE2 3EQ					
Fault Details	HS	Hydraulic Silencer			
Priority	Normal				
Order No	987654	Job Closed	<input type="checkbox"/>	Time	
Contact Details	Fred Smith		Night Call	<input type="checkbox"/>	Misuse
Engineer	MIK	Mike Kendal	<input type="checkbox"/> Non Chargeable		
Engineer Notified	/ /	Time	_: _:	Set By: _____ Time: _____	
Last Call	N/A	<input type="checkbox"/> Out Of Service			
Report Code	004	Report Date	05/11/02	Set By: _____ Time: _____	
Report Details	For site attendance, tracing fault to defect:				
Time Out Of Service: _____					
Time Used (24 Hr Clock - HH:mm)					
Site Arrival Time	00:00	Departure	_: _:		
Time On Site	_: _:	Travel Time	_: _:		

1.3.2 Call Manager

Open the Breakdown Module click on Utilities in the tool bar then select Call Manager.

Elevator Service Manager® - Version 6

Call Manager

Date Range
 From: 30/12/2006 To: 30/01/2007 Range: All

Client Filters
 Client: Site: Elev.:

Status
 Status: Not Completed Priority: All Engineer: All

Call No	Elevator	Priority	Status	Engineer	Since Call	Site Name	Client Ref
8100	LIFT2253	Normal	Attended	MIK	-	GREGG HOUSING	987654
8092	LIFT2202	Normal	Attended	BW	-	ABERSEN LANE	micky
8093	LIFT2200	Normal	Attended	FGH	-	ABBEY HOUSE	AB/896
8094	LIFT2202	Normal	Attended	GH	-	ABERSEN LANE	N/A
8095	LIFT2261	Normal	Attended	-	-	BADGER AND FOX HOTEL	C675
8096	LIFT2253	Normal	Attended	GH	-	GREGG HOUSING	321
8097	LIFT2200	Normal	Attended	KH	-	ABBEY HOUSE	123456
8099	LIFT2253	Normal	Attended	KH	-	GREGG HOUSING	Emergency
8101	LIFT2200	Normal	Attended	DG	-	ABBEY HOUSE	n/a
8102	LIFT1334	Normal	Entered	GH	>2 Days	LIFTSERVE LTD.	dghghgh

Buttons: New Call, Edit Call, Call Report, Close Call, Remove, Details, Close

The call manager will allow calls to be selected by Date, Range, Client, Site, Elevator, Status, Priority or by Engineer or any combination of these. When the calls have been selected highlight the required call to be queried and click on edit. The following window will appear.

Edit Call

Call No: 8100 Site: 119
 Elevator: LIFT2253 Contract: 654321 Type: A
 Client: CPM019 Gregg House Management Ltd
 Client Ref: Site Address: Gregg Housing, London Road, Hulme End, Dudley, QE2 3EQ
 Call Date: 20/10/02 Time: 17:20 Invoice Details

Elevator Notes

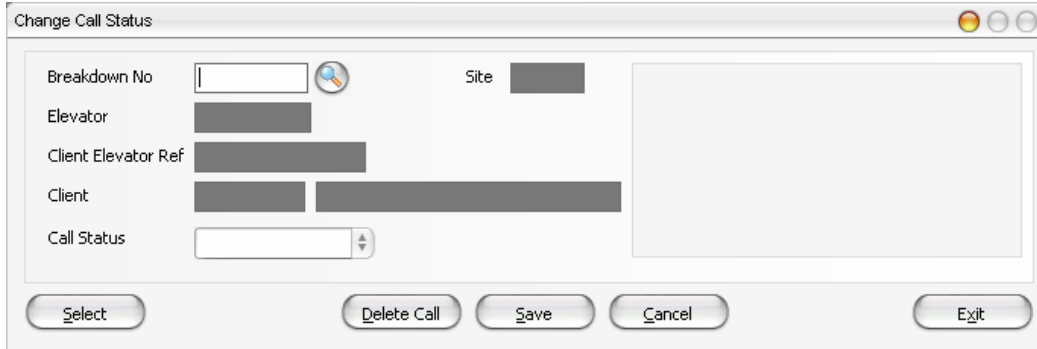
Fault Details: H5 Hydraulic Silencer
 Priority: Normal
 Order No: 987654 Job Closed: [] Time: []
 Contact Details: Fred Smith Night Call: [] Misuse: []
 Engineer: MIK Mike Kendal Non Chargeable: []
 Engineer Notified: / / Time: [] Set By: [] Time: []
 Last Call: N/A History Out Of Service: []
 Time Used (24 Hr Clock - HH:mm) Set By: [] Time: []
 Site Arrival Time: 00:00 Departure: [] Unset By: [] Time: []
 Time On Site: [] Travel Time: [] Time Out Of Service: []

Closed For: [] By: [] At: []
 Closed For: [] By: [] At: []

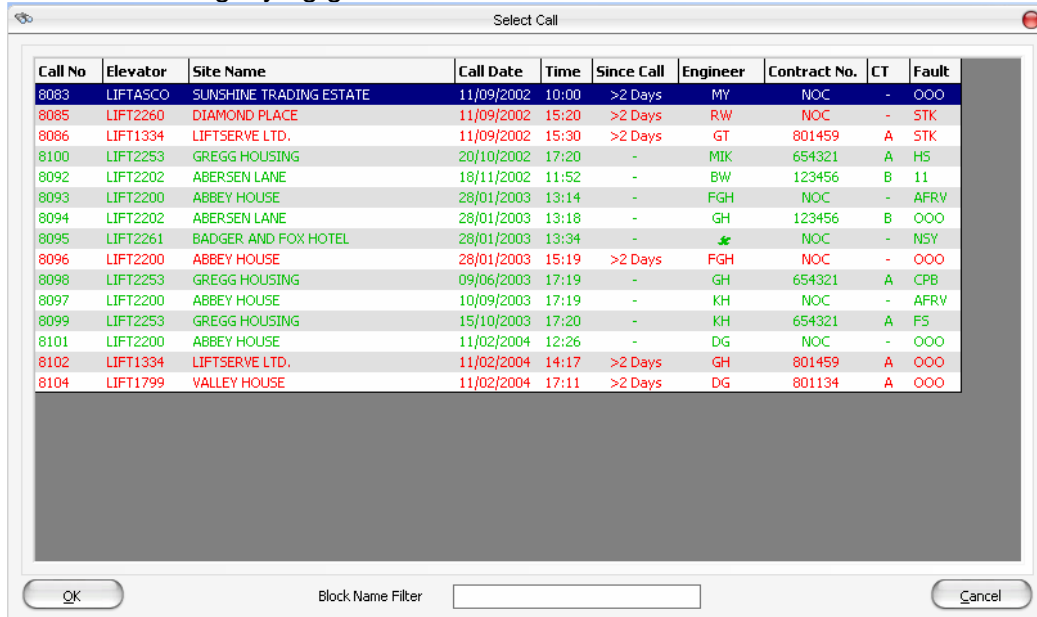
Buttons: Select, Log, Worksheet, Materials, Save, Abandon, Edit

1.3.3 Change Call Status

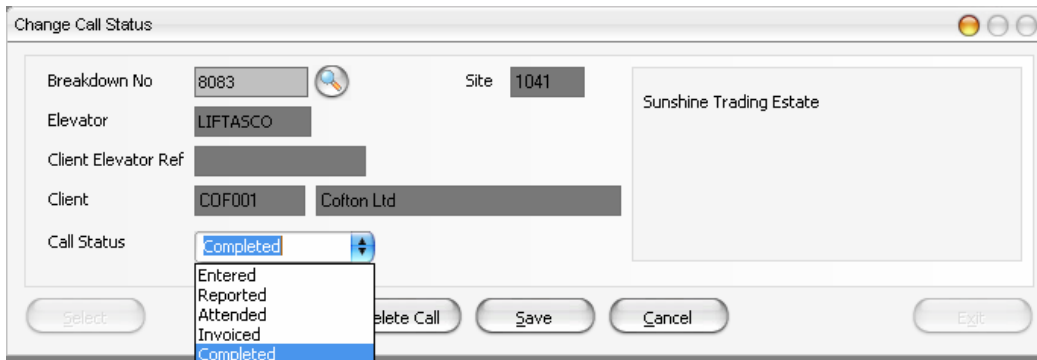
Open the Breakdown Module click on Utilities in the tool bar then select change Call Status. The purpose of this is to allow amendments after a call has been processed through to invoiced.



Click on the magnifying glass next to the Breakdown No. field.



Highlighting the call and then click OK or double click the call.

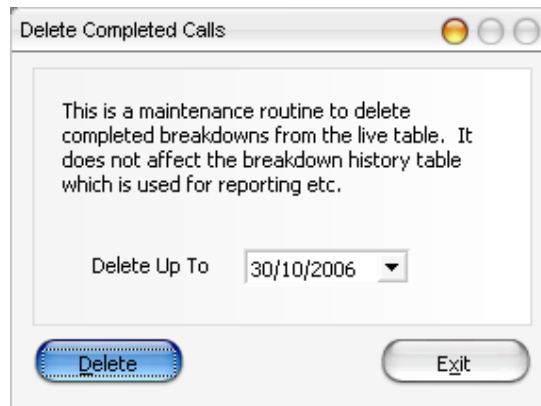


You will now see the details of the call you have selected and at the bottom of the window is the field required to change the status. Select the Save button to save the change and Exit to close the window.

1.3.4 Delete Completed Calls

Open the Breakdown Module click on Utilities in the tool bar then select Delete Completed Calls.

The following procedure allows you to remove history up to a date set by you. May be calls more than 5 years old.?

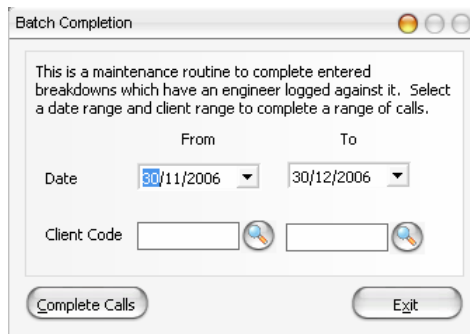


To delete the history enter the date required then select Delete, to quit this window select exit.

1.3.5 Complete Calls by Batch

Open the Breakdown Module click on Utilities in the tool bar then select Complete Calls by Batch.

The following procedure will allow the completion of calls within a period and for specific Clients



Set the dates that calls are to be completed by then select the range or individual client calls are to be completed for. Select Complete Calls, this will complete the calls selected click on exit to close the window.