

ServiceViews™

Enterprise field service software from XLNT

Recognize anything in the image below? Scheduling is difficult, missed inspection dates occur, angry customers are calling. You know putting out these fires eats up time and destroys profits. The **ServiceViews™** designers know this, too, because they are in the Fire detection, suppression, and protection sales and service business! Let **ServiceViews™** help you minimize the chaos and maximize your profitability! Derive order out of chaos!



Take a look at Seventy Five Ways that ServiceViews™ helps to eliminate the Chaos

The **ServiceViews™** software suite includes 75 primary applications in an enterprise software system which provides many benefits for those companies employing a field sales and service force. Whether you have technicians, engineers, consultants or other individuals charged with providing services to customers, clients or subsidiary organizations, you can benefit from implementation of XLNT Software Solution, Inc.'s **ServiceViews™** software suite.

Collaboration

ServiceViews™ software suite is a collaboration product. In light of its design, you can share information with customers, vendors, contractors, sub-contractors and other important partners, and allow these partners to access data that you manage for them, or to access work product and enterprise information you determine to be appropriate for sharing. All information which you collect on a day to day basis, during the normal course of your business operations. Your clients can check their scheduled service calls, the status of service contracts, work tickets and even create records for emergency service calls from their desktop interface.

Accessibility

ServiceViews™ provides an Equipment Record for each of your customers' systems or pieces of equipment including sub-components where desired. Each of the items in the record may have specific technical information required by the inspection or service technicians in the field. With **ServiceViews™**, your field service technicians can have real-time access to this technical information at any time and in any location. Eliminate costly phone calls in which an inside clerk has to access and convey information to the technician, or has to print and fax or send documents each time the technician is on a service call. Now the information is available real time and up-to-date as well as accessible when and where needed, saving you time and money.

Visibility

Due to its open and transparent design, data, and more importantly, information visibility is enhanced yet guarded under password protected access. **ServiceViews™**, when used as the back office enterprise system, allows visibility to your employees, vendors, service partners and clients of the information you choose to share, or information access that the clients license from you. This visibility is accomplished through XLNTServiceView™, a web browser based application to be used in concert with **ServiceViews™**.

ServiceViews™ Modules

Accounting Administration

Accounting Department

Accounting Management

Administration Department

Administration Management

Employment

Engineering Administration

Purchase Warehouse Administration

Purchase Warehouse Department

Purchase Warehouse Management

Sales Administration

Sales Department

Sales Management

Service Administration

Service Department

Service Management

Technician Field Service

Universal Applications

The Primary 75 Chaos ending ServiceViews™ Applications

Accounting Administration

- A.1 Batch Check Writer

The Batch Check Writer application provides you with the ability to review outstanding "payables," select them for payment, apply any Vendor credits prior to payment, and print or void a check. Another feature is the ability to pick from an unlimited list of your payment sources while insuring adequate funding.

The application also has a check register, and the ability to filter both open payables and the register by date or vendor.

Batch Check Writer [CUSTOM]

Check Writer

App Mode: View Register | Invoice Age: All Invoices | Bank: WACHOVIA - W | Check Number/Name: 3222 | Check Date: | Printer: Dell | Available Balance: \$211,624.59 | Filter from: | to: | Printing Operation: |

Get Invoices | Clear Filters | Print Checks

Clear All

Invoices

Type	Check Number	Check Date	Name & Address	Invoice Code	Vendor Invoice	Amount Due
Vendor Payment	3221	12/23/2009	All A's			\$80.00
				200012-INV001	ALLAS-INV-006	\$80.00
Vendor Payment	3220	12/22/2009	All A's			\$260.00
				200013-INV001	ALLAS-INV-007	\$260.00
Vendor Payment	3219	12/22/2009	All A's			\$320.00
				200012-INV001	ALLAS-INV-006	\$320.00
Vendor Payment	3218	12/22/2009	All A's			\$113.79
				200011-INV001	ALLAS-INV-005	\$113.79
Vendor Payment	3217	12/22/2009	All A's			\$700.00
				200009-INV001	ALLAS-INV-003	\$100.00
				200010-INV001	ALLAS-INV-004	\$600.00
Vendor Payment	3216	12/22/2009	All A's			\$360.00
				200008-INV001	ALLAS-INV-002	\$360.00
Vendor Payment	3215	12/22/2009	All A's			\$210.00
				200007-INV001	ALLAS-INV-001	\$210.00
Employee Pay	3213	12/22/2009	Joe's Expense			\$400.00

- A.2 Credit Card Service Fee Payment

The Credit Card Service Fee Payment application permits its user to easily manage credit card service fee payments in a streamlined and concise fashion. The application displays a clear record of each credit card transaction, the fee associated with each transaction and the date upon which the transaction occurred. Credit card transaction records may then be verified against the credit card service provider's monthly statement. Verified credit card transaction records are displayed in the Payment Source application's Transaction table for reconciliation.

Credit Card Service Fee Payment					
Default Query					
Vendor	Status	Start Date	End Date		
AAA	Completed	12/01/2009	12/17/2009		
AAA	Completed	10/01/2009	10/30/2009		
AAA	Completed	10/31/2009	11/30/2009		
Legends Current Cell : B1 <input type="checkbox"/> Details on scroll					
Vendor Info		Statement Info			
Vendor Code: AAA		Start Date: 12/01/2009			
Name: Triple A Credit Card Clearing Corp.		End Date: 12/17/2009			
Street: 1 Main Street		Total Open Fees: \$44.14			
P.O. Box:					
Floor / Suite:					
City: New York		Country: New York			
State: New York		Zip: 10001			
Country: USA					
Salutation: Mr. First Name: Ralph M.I.: Last Name: Jenkins		Area Code: (212) Phone #: 555-5555 Ext: 101			
		Calculated Totals			
		Gross Sales: \$2,293.92			
		Open Fees: \$44.14			
		Auto-Paid Fees: \$0.00			
		Net Sales: \$2,249.78			
Service Fee Summary					
Withdrawal from Bank: WACHOVIA - Wachovia Operating Account					
Payment Status: Completed					
Total Transaction Count and Fee Amounts By Credit Card (Blue cards have Auto-Paid fees)					
Discover	1	\$1.73	VISA	1 \$17.34	
Master	2	\$25.07			
Open Service Fees					
Pay Fee?	Tran Date	Tran Amount	Fee Amount	Net Amount	Credit Card
<input checked="" type="checkbox"/>	12/17/2009	\$173.39	\$1.73	\$171.66	Discover
<input checked="" type="checkbox"/>	12/17/2009	\$866.94	\$17.34	\$849.60	VISA
<input checked="" type="checkbox"/>	12/17/2009	\$842.19	\$16.84	\$825.35	Master
<input checked="" type="checkbox"/>	12/17/2009	\$411.40	\$8.23	\$403.17	Master
Auto-Paid Service Fees					
Include?	Tran Date	Tran Amount	Fee Amount	Deposit Amount	Credit Card

- A.3 Journal Entries

The Journal Entries application is provided so that you can make direct Journal adjustments to your General Ledger accounts as required, and then update them as a batch or group.

The screenshot shows the 'G/L Journal Batch' application window. At the top, there are input fields for 'Batch Code' (12182009-001), 'Due Date' (12/18/2009), 'Class' (General Adjustment), 'Status' (Firm), 'Description' (Inventory Variance), and 'Net Amount' (\$0.00). Below these is a tabbed interface with four tabs: 'Miscellaneous Data' (selected), 'Transaction Lines', 'Recurring Parameters', and 'Updates & Functions'. The 'Miscellaneous Data' tab contains fields for 'Reference Code' (432967), 'Entry Date' (12/28/2009), 'Audit Number' (121), and a 'Remarks' text area containing the text 'Adjustment to invoice due to Vendor error'.

- A.4 Payment Deposit

Never miss a bank deposit, as all incoming payments are captured and summarized in the Payment Deposit application. Select the payments to include on your physical bank deposit slip. When the record is updated, the deposit is recorded in the Payment Source or bank master record and updates its value.

Payment Deposit [ADD]

List of Payment

Deposit Slip #	Deposit Date	Deposit Amount	
1001	12/16/2009	\$480.00	Cleared
1002	12/21/2009	\$70.00	Cleared
1004	12/22/2009	\$123.85	Cleared
1005	12/22/2009	\$48.15	Cleared

Legends: Current Cell :

☐ Details on scroll

Deposit Details

Bank Wachovia Operating Account
Deposit Date 12/24/2009
Deposit Amount \$10,016.18
Deposit Slip # 1224-001
Status Open

Start Date 11/24/2009 **End Date** 12/24/2009

NOTE: When a payment deposit record is in the Open status it may be edited.

Open status records are not moved to Payment Sources, nor are Submitted records.

Submitted records may be edited only to convert them to a Cleared status.

Cleared status records will be displayed in Payment Sources.

In Other Payments tab for Check Number field please enter: Check# - Bank Name

Customer Payments
 Vendor Payments
 Other Payments

Customer	Payment Type	Check Number	Amount	Payment Date	Deposit Payment
Cellular Wireless	Check	1236 - Chase	\$83.46	12/23/2009	<input checked="" type="checkbox"/> All
Albertson Contracting	Check	1238 - Chase	\$720.00	12/23/2009	<input checked="" type="checkbox"/>
Alltech Electrical Contracting	Check	12365 - Sovereign	\$640.00	12/23/2009	<input checked="" type="checkbox"/>
Zeta Corporation	Check	12362 - Citi	\$867.00	12/23/2009	<input checked="" type="checkbox"/>
Bogart & Bachall Realty	Check	12351 - Wachovia	\$5,536.50	12/23/2009	<input checked="" type="checkbox"/>
Delta Corporation	Check	12352 - Chase	\$1,040.40	12/23/2009	<input checked="" type="checkbox"/>
Madison & Unger Property Management	Check	12354 - Citibank	\$606.90	12/23/2009	<input checked="" type="checkbox"/>
Alpha Corporation	Check	12342 - Fulton	\$521.92	12/23/2009	<input checked="" type="checkbox"/>

Accounting Department

- B.1 Customer Credits

Customer credits are easily handled in **ServiceViews™**. Assign the credits to the appropriate ledger buckets, including tax and shipping. You are even able to associate a credit with a “closed” or paid invoice, posting the amount of the credit to the appropriate A/R ledger as “unapplied funds”.

Customer Credits

Default

Customer	
Alpha Corporation	12/21/2009
Armada Electrical	12/21/2009
Bogart & Bachall Realty	12/21/2009

Legends
Current Cell: B3

☐ Details on scroll

Customer Information

Customer	BBR	Credit Date	12/21/2009
Name	Bogart & Bachall Realty		
AddrLine1	150 Richland Avenue		
AddrLine2			
AddrLine3	2nd Floor		
City	Staten Island	County	Richmond
State	NY	Zip	10305-
Country	USA	Phone	718 777-5353

Credits

Invoice	Invoice Date	Invoice Due Date	Invoice Amount	Invoice Balance Amount	Credit Type	Credit Amount	Comments
PS200010	12/21/2009	01/17/2010	\$346.78	\$0.00	Credit Note	\$60.00	Overcharged

- B.2 Customer Maintenance

The Customer Maintenance application in ServiceViews™ is a comprehensive record of the customer and their associated activity and records, including invoice and purchase history, links to equipment records, physical site records as well as multiple sales addresses, shipping addresses and more. It displays all invoices, their payment status, as well as the dollar value of un-invoiced work.

Customer Maintenance

MRH Summary Table

NAME	Customer Code	Customer Type	Credit Status	
Alpha Corporation	ALPHA	End User	Excellent	www.alphacorp.com
Epsilon Corporation	EPSILON	End User	Excellent	www.epsiloncorp.com
Zeta Corporation	ZETA	End User	Excellent	www.zetacorp.com
Alltech Electrical Contracting	AEC	Electrical Contractor	Excellent	www.alltech.com

Legends: Current Cell: B1

☐ Details on scroll

Customer Header

Code: ALPHA Customer Type: End User

Company Name: Alpha Corporation

Web Site: www.alphacorp.com

XWeb Filter Date: 01/01/2008

Create New Site Master

Current Financial

On Order Amount	\$0.00
Shipped (not Invoiced)	\$0.00
Open Invoice Amount	\$0.00
Closed Invoice Amount	\$0.00
Unapplied Credit	\$0.00
Available Credit	\$100,000.00
Accounts Receivable	\$0.00
Next Payment Due Date	
Next Due Amount	\$0.00
Last Receipt Date	12/23/2009
Last Receipt Amount	\$521.92

Equipments Financial History Pictures Documents

Customer Default Billing Address Other Address Site Information

Customer Default Billing Address

Street: 1 Main Street Area Code: Phone Number:

P.O. Box: First: (212) 555-5555

Floor/Suite: Second: (212) 555-5556

City: New York County: New York Cell: (212) 555-5557

State: New York Zip Code: 10001- Fax: (212) 555-5558

Sales Rep: PP-2-Sadie - Calderon

Accounts Payable A.I.A. Billing: Never

Salutation	First	MI	Last	Area	Phone Number	Ext.	Title	Email
Mr.	James		Alpha	(212)	555-5555	101	President	demo@xlintinc.com

Contact Information

Other	Mr.	First	MI	Last	Area	Phone Number	Ext.	Title	Email
Other	Mr.	Bob		Smith	(212)	555-5555	102	Director of Fax	demo@xlintinc.com
Other	Mr.	Sam		Jones	(212)	555-5555	103	Accounts Pay	demo@xlintinc.com

Financial Information

Payment Terms Rule	NET30	Credit Collection	0 Days
Payment Terms Days/Date	Days	Credit Limit	\$100,000.00
Payment Terms Day of Month	30	Credit Period Allowed	6 Period
Payment Discount Flat/Percent	None	0-30 Days	\$0.00
Payment Discount Rate	0	31-60 Days	\$0.00
Payment Discount Days/Date	None	61-90 Days	\$0.00
Payment Discount Day of Month	0	91-120 Days	\$0.00
Default Pay Method	Check	121-180 Days	\$0.00
		>180 Days	\$0.00

Account Association: 0 Detail Account Code: EU - End User Com Tax Class: Taxable

Tax Exempt No.: Tax Exempt Reason: Pricing Class: StandardCust

Application Comments

- B.3 Customer Site Dashboard

Review the transactions such as work orders, payment history and billing history for any customer, as well as their equipment details, all in a single application.

Customer List

CODE	NAME
ABC	A. B. C. Electrical Contracting
AC	Albertson Contracting
AEC	Alltech Electrical Contracting
ALPHA	Alpha Corporation
AT	Apple Transit
AE	Armada Electrical
BETA	Beta Corporation

Customer Details

Salutation	First	MI	Last	Title	Credit Limit	+	\$100,000.00
1st Contact	Mr.	James	Alpha	PRES	On Order	-	\$0.00
2nd Contact	Mr.	Bob	Smith	DIR. FAC	Shipped (not Invoiced)	-	\$0.00
Company Phone	(212)	555-5555			Open Invoice Amount	-	\$0.00
					Closed Invoice Amount	-	\$0.00
Open Work Orders	None	Payment Terms	NET30		Unapplied Credit	+	\$0.00
Work Remaining Approvals	None				Available Credit	=	\$100,000.00
Open Log Book(s)	None				Accounts Receivable		\$0.00
Past Due Balance	\$0.00				Next Payment Due Date		
					Next Due Amount		\$0.00
					Last Receipt Date		12/23/2009
					Last Receipt Amount		\$521.92

Code	Name	Address	City	State	Zip	PhoneNumber
ALPHA-SITE-1	Alpha Corporation Main Offices	1 Main Street	New York	NY	10001	212-555-5555
ALPHA-SITE-2	Alpha Corporation Factory	3 Main Street	New York	NY	10001	212-555-5555
ALPHA-SITE-3	Alpha Corporation Warehouse	5 Main Street	New York	NY	10001	212-555-5555
ALPHA-SITE-4	Alpha Corporation Outlet Shop	7 Main Street	New York	NY	10001	212-555-5555
ALPHA-SITE-5	Alpha Corporation Catalog Sales...	9 Main Street	New York	NY	10001	212-555-5555

Customer Site Dashboard

1. Database to Search
 Site:

2. Optional Selection Criteria

Field:

☐ ID
☐ CUSTID
☐ ADDRID
☐ BILLTOADDRID
☐ TYPE
☐ CODE
☐ OWNERCODE
☐ PARENTSITEID
☐ FILTER
☐ NAME

3. Search

Site List

CODE	NAME
BETA-SITE-5	Beta Corporation Catalog Sales Center
BETA-SITE-4	Beta Corporation Outlet Store
BBR-MAIN-SITE1279	Bogart & Bacall Main Office
OW-HQ-SITE540	Cellular Corp HQ
ENC-CONSUL-SITE790	Consulate Building-E 38th
DELTA-SITE-1	Delta Corporation Main Offices

Site Details

Site Name	Beta Corporation Catalog Sales Center	Last Charge Date	
Address 1	9 Center Ave	Last Service Date	
Address 2			
City/State/Zip	New York NY 10001	Travel Miles	7

Salutation: Mr. First: Fred MI: Last: Gardener Title:
 Contact Name: Mr. Office Phone: (212) 555-5555

Code	Name	InstallDate	Job	LastInspection
BETA-SITE-5-EQUIP-3	Beta Corporation	12/14/09		
BETA-SITE-5-EQUIP-4	Beta Corporation	12/14/09		
BETA-SITE-5-EQUIP-5	Beta Corporation	12/14/09		

- B.4 Invoice Maintenance

Processes auto-generated or manually created invoices of charges for materials and services supplied. In addition, it displays individual line items and allows for adjustment of billing at the invoice time on an overall or line by line basis.

Invoice Maintenance

Default Query

Customer	Order	Invoice	Invoice Date	Invoice Status	Total Price
AC	T200028	T200027	12/23/2009	Completed	720
AC	MS200021	MS200020	12/21/2009	Completed	70
AC	PS200013	PS200013	10/07/2009	Completed	571
AE	PS200005	PS200005	12/17/2009	Completed	411

Legends: Current Cell: B3

☐ Details on scroll

Sales Invoice Maintenance

Customer Code: AC Invoice Code: PS200013 Job #: Gross Amt. \$571.39

Select Order to Invoice: PS200013 Invoice Status: Completed Svc Cont #: Discount Amt. \$0.00

Invoice Date: 10/07/2009 Total Tax \$0.00

Post to Sales Ledger ☒ Reference: Fees Amt. \$0.00

Payment Terms: NET30 Net Amt. \$571.39

Addresses

Bill Stored Code: 505 Madison Ave - Rich Aikens

Bill Name: Albertson Contracting

Street: 505 Madison Ave

P.O. Box:

Floor / Suite: 3rd Floor

City: New York County: New York

State: New York Zip: 10017-

Phone: (212) 555-0660 Contact: Mr. Rich Aikens

Ship Name: XLNT Software Solutions, Inc.

Street: 36 Warren St

P.O. Box:

Floor / Suite:

City: New York County: New York

State: New York Zip: 10001-

Phone: (212) 555-0780 Contact:

Order Code	Line Seq Item Code	Description	Service Performed Notes	Order Quantity	Delivered Quantity	Invoiced Quantity	Maximum Invoice Quantity	Unit Price	Discount %	Discount Unit Price
- PS200013	1 - 01G-3	3" Grooved End Butter...		3	3	3	0	\$68.57	0%	\$
- PS200013	2 - 01G-4	4" Grooved End Butter...		4	4	4	0	\$91.42	0%	\$

- B.5 Sales Payment Receipts

Denotes receipts on invoices and allocates customer payments against open invoices, credits, etc. Maintain a list of all paid invoices and their history.

Sales Payment Receipts

Default

Customer Code	Receipt Date
AC	12/23/2009
AC	12/21/2009
AC	10/07/2009
AE	12/17/2009

[Legends](#) Current Cell: B3

☐ Details on scroll

Payment Details

Payment #	200013			Mode of Payment	Credit Card
Customer	AC			Credit Card Type	Master
Name				Credit Card Number	1234-2345-5432-4321
Street	505 Madison Ave			Expiration Date	12/18/2013
P.O.Box				Security Code	111
Floor/Suite	3rd Floor				
City	New York	County	New York		
State	NY	Zip	10017		
Country	USA	Phone	(212) 555-0660		
Status	Complete			Receipt Date	10/07/2009
				Customer Payment Date	10/07/2009
				Amount Being Paid	\$571.39
Prepay Amount	\$0.00			Amount Remaining After Paying Invoices	\$0.00
Prepay Remaining Amount	\$0.00	Prepay Note		Total Unapplied Cash	\$0.00

Note: (Amount being paid) should be entered in order to make payments against invoices or use 'Use Unapplied Cash'

[Sales Invoices](#)

Invoice	Invoice Amount	Invoice Balance Amount	Invoice Payment Due Date	Discount Amount	Receipt Amount	Use Unapplied Amount	Comments
PAYMENT-PS200013	\$571.39	\$0.00	11/06/2009	\$0.00	\$571.39	\$0.00	

- B.6 Site Master Maintenance

Create a Site record for each physical address at which systems reside and service is performed. The **ServiceViews™** site record represents a physical address, usually a building, and as such, more than one Customer may exist at a site. A site may also have several customers and each customer can have multiple "systems" which you service or maintain, and those systems may be managed by a number of "service companies."

Site Master Maintenance

QueryFor-51049

Site No	
ALPHA-SITE-5	Alpha Corporation Catalog S
AT-MAIN-SITE1108	Apple Main Office
BBR-MAIN-SITE1279	Bogart & Bacall Main Office
BETA-SITE-4	Beta Corporation Outlet Store

[Legends](#) Current Cell : C16

☐ Details on scroll

Site Info

Site No: **BETA-SITE-4** Site Name: **Beta Corporation Outlet Store**

Address: **7 Center Ave** Tax Code: **New York City**
P O Box: Tax Class: **Taxable**
Cross Street: **Waverly Street** Non Tax Cert No:
City: **New York** County: **New York** Non Tax Reason:
State: **New York** Zip: **10001-**

Contact: **Mr. Fred** M.I.: Last Name: **Gardener** Last Charge Date:
Contact Phone: **(212) 555-5555** Extension: **103** Fax: **(212) 555-5558** Last Service Date:
Contact Home Phone: **(718) 555-6666** Contact Cell: **(718) 555-6667** Travel Miles: **7**
Email: **fgardener@email.com**

[Service Companies](#) [Customers](#) [Equipments](#) [Comments](#) [Documents](#) [Pictures](#)

Product Type: **All**

System Type	Classification	Equipment #	Service Co.
Fire Alarm Systems	Interior Fire Alarm	BETA-SITE-4-EQUIP-1	Beta Corporation
Fire Alarm Systems	Class E Voice Communication System	BETA-SITE-4-EQUIP-2	Beta Corporation

Click the push pin next to the zip code to get driving directions and location for any address record found in the **ServiceViews™** system.

Site Master Maintenance

QueryFor-51049

Site No	Site Name
ALPHA-SITE-5	Alpha Corporation Catalog Sales Center
AT-MAIN-SITE1108	Apple Main Office
BBR-MAIN-SITE1279	Bogart & Bacall Main Office
BETA-SITE-4	Beta Corporation Outlet Store

[Legends](#) Current Cell : C16

☐ Details on scroll

Site Info

Site No: **BETA-SITE-4** Site Name: **Beta Corporation Outlet Store**

Address: **7 Center Ave** Tax Code: **New York City**

P O Box: Tax Class: **Taxable**

Cross Street: **Waverly Street** Non Tax Cert No:

City: **New York** County: **New York** Non Tax Reason:

State: **New York** Zip: **10001-**

Contact: **Mr. Fire**

Contact Phone: **(212) 555-**

Contact Home Phone: **(718) 555-**

Email: **fgardener@**

Service Companies **Cus**

Product Type: **All**

System Type:

Fire Alarm Systems: **Interior Fire**

Fire Alarm Systems: **Class E Vok**

7 Center Ave New York NY 10001 - Google Maps - Microsoft Internet Explorer provided by XLNT Software Sol.

File Edit View Favorites Tools Help

Address: <http://maps.google.com/maps?q=7+Center+Ave+New+York+NY+10001>

Web Images Videos Maps News Shopping Gmail more Help Sign in

Google maps 7 Center Ave New York NY 10001 Search

Find businesses, addresses and places of interest.

[Get Directions](#) [My Maps](#) [Print](#) [Send](#) [Link](#)

7 Center St
Staten Island, NY 10306

[Directions](#) [Search nearby](#) [Save to...](#) [more](#)

Did you mean:

- [7 Center Dr, Queens, NY 11363](#)
- [4-7 Center Blvd, Queens, NY 11101](#)
- [7 Center Dr, Queens, NY 11357](#)
- [7 Center Pl, Staten Island, Richmond, NY 10306](#)

Map Satellite Terrain

Richmond Rd

Center St

Ardsley St

500 ft

Map data ©2009 Google - Terms of Use Report a problem

Accounting Management

- C.1 Chart of Accounts

Set up and manage General Ledger accounts, budgets and financial details, including postable and summary accounts. Devise your own schedule of values which are important to your business operation or growth areas. The system allows you to track and plan for this eventuality.

Chart of Accounts [EDIT]

Default Query

Account Type	Account #	Name	To Increment
Assets			
	10000	Cash	
	10100	Petty Cash	
	12000	Accounts Receivable	
	12100	Allowance For Doubtful Accounts	

Legends: Current Cell : C4

☐ Details on scroll

Account Data

Account # Summary Account

To Increment Account Type

Account Name Posting Type Status

Details

PERIOD	ACTUAL	SET BUDGET	BUDGET	FACTOR
Previous Year	\$0.00			
January	\$0.00	<input checked="" type="checkbox"/>	\$123,000.00	1.06
February	\$0.00	<input checked="" type="checkbox"/>	\$185,000.00	1.06
March	\$0.00	<input checked="" type="checkbox"/>	\$110,000.00	1.03
April	\$0.00	<input checked="" type="checkbox"/>	\$147,500.00	1.04
May	\$0.00	<input checked="" type="checkbox"/>	\$190,000.00	1.02
June	\$0.00	<input checked="" type="checkbox"/>	\$210,000.00	1.03
July	\$0.00	<input checked="" type="checkbox"/>	\$185,000.00	1.07
August	\$0.00	<input checked="" type="checkbox"/>	\$225,000.00	1.05
September	\$0.00	<input checked="" type="checkbox"/>	\$204,156.00	1.06
October	\$0.00	<input checked="" type="checkbox"/>	\$185,000.00	1.1
November	\$0.00	<input checked="" type="checkbox"/>	\$160,000.00	1.07
December	\$0.00	<input checked="" type="checkbox"/>	\$135,000.00	1.05
Adjust	\$0.00	<input checked="" type="checkbox"/>	\$140,000.00	1.05
Total	\$0.00		\$125,000.00	

Account Class

1099

1099 Class

SET BUDGET

Calculation Method

Amount

- C.2 Detail Account Codes

Detail Account codes are used to define and segregate or resolve G/L account entries. Detail Account codes are used to allocate transaction flows from various applications to the appropriate account in your Chart of Accounts.

Detail Account Codes [CUSTOM]

Details Account Code Header

Select Type of Account: **C - Customer**

Click to Save Changes: **Add/Update Detail Accounts**

Detail Account Code	Description	Status	Valid From	Expires On
EUU	End User Utility	Active		
ENG	Engineering Company	Active		
EUH	End User Hospital	Active		
EC	Electrical Contractor	Active		
MC	Mechanical/ Sprinkler Contractor	Active		
EUS	End User School	Active		
REMC	Real Estate Management Company	Active		
EUNP	End User Non Profit	Active		
EU	End User Commercial Entity	Active		
EUGA	End User Government Agency	Active		
FAC	Fire Alarm Competitor	Active		

- C.3 Labor Expense

Complete employee expense account reporting and management, including reimbursement and history tracking. The system allows employees to enter reimbursement and non-reimbursable expenses.

Labor Expense

Default Query

Statement Number	Employee Code	First Name	Last Name	Expense Period From	Expense Period To
200083	KB-2	Jose	Exposito	12/07/2009	12/11/2009
200082	DM-2	Donna	Miller	09/22/2009	09/25/2009

Legends Current Cell: B1

☐ Details on scroll

Expense Header

Statement #	200083	Manager	Frances Exendine
Employee	Jose Exposito - KB-2	Manager Email	msteckman@xlntinc.com
Email	msteckman@xlntinc.com	Approval Status	Approved
Department	IT	Approval Date	12/16/2009
Position	Associate Director MIS Operations		
Status	Submitted		

[Re-submit Expenses](#)

Total Miles	154
Mileage Amount	\$84.70
Personal Amount	\$103.57
Corporate Amount	\$423.10
Total Expense	\$611.37

Total Reimbursement Amount: \$188.27

Purpose: Trip To IT/Info Tech Conference

Expense From: 12/07/2009 Expense To: 12/11/2009

Expense For Type:

Notes: Expenses from last week's trip to the IT conference in Baltimore.

Expense Details [Mileage Log](#) [Payment History](#) [Documents](#)

Expense Date	Type	Description	Expense For Type	Expense For	Pay Type
12/07/2009	Hotel	Hotel Stay In Baltimore During IT Conference.			Company Expense
12/07/2009	Meals	Meals During IT Conference			Personal Expense

- C.4 Labor Management

Create and maintain a list of employees, subcontractors and any other labor resources. Vacation and time off history are included, along with compensation, hours worked and other important information. List and view any assets assigned to the employee, along with their skills and certifications.

Labor Management

All Employees

Code	First Name	Last Name	Position
AA-2	Abby	Carpenter	Account Billing & Collection Coordinator
AC-3	Absence	Company	Personnel Director & Accounting Manager
AE-1	Absence	Employee	Bookkeeper & Accounts Payable
AE-4	Asset	Employee	Service Department Coordinator

Legends: Current Cell : C1

☐ Details on scroll

Labor Header

Name: Ms. Abby Carpenter

Salutation (First): (Middle Initial): (Last):

Employee Type: Office Staff

Employment Status: Full Time

Code: AA-2

SSN#: *****

Gender: Female

Department: Accounting Dept

Position: Account Billing & Coll

Manager: Abbott - Mondale

Employment Start Date: 06/09/2003

Employment End Date:

Birth Date: 11/13/1980

Area Code: (718) Phone Number: 333-3333 Extension:

Office: (347) 555-5555

Cell:

Nextel Direct:

Pager:

Personal Information

Marital Status: Single Never Married

Marriage Date:

Address: 39-36 250th

City: Rosedale

County: Queens

State: New York

Zip: 11422- Area Code: Phone Number:

Home: (718) 875-3141

Fax:

Email: demo@xlntinc.com

Emergency Contact

Name: Babette Carpenter

Relation: Sister Phone: (212)888-8888

Address: 15 S 15th St, Rosedale NY 11422

Expenses

References

License And Other Information

Absence History Data

Pictures

Financial And Time Data

Labor Expense Details

Labor Asset Details

Cost And Price Data

Skill Listing

Financial And Time Data

Detail Account Code: Straight Time Labor

Commission Rate1: 0% Hours Billable Worked: 0

Commission Rate2: 0% Hours Overtime Worked: 0

Commission Rate3: 0% Hours Straight Time Worked: 0

Holidays Taken: 0 Hours Commission Timed: 0

Absence Type	Allowed Days	Year to Date Days	Balance	Allowed Days (Next Year)	Year to Date (Next Year)	Balance (Next Year)	Allowed (History La)
Maternity/Pate...	30	0	30	30	0	30	
Vacation	20	0	20	20	0	20	
Personal	15	0	15	15	0	15	
Unpaid Sick	5	0	5	5	0	5	
Jury Duty	5	0	5	5	0	5	
Military	5	0	5	5	0	5	
Sick	20	0	20	20	0	20	

- C.5 Manual Check Writer

Software representation of your physical handwritten checks. Either create a "manual fast check" or record the details of a physical, handwritten check to ensure the accuracy of your bank accounts' balances.

Manual Check Writer

Default Query

Check Number	Name	STATUS	Date
2501	American Heart Association	Cleared	12/21/2009
2502	Royer Flowers	Cleared	12/22/2009
2503	Girl Scouts Of America, Troop 123	Cleared	11/27/2009
2504	New York State Department Of Motor Veh...	Firm	12/24/2009

[Legends](#) Current Cell: C1

☐ Details on scroll

Check Details

Drawn On: Check Number:
Check Date:

Check Type:

Pay Type: Reference: Status:

Pay To: Amount:

Memo:

Reason:

- C.6 New Hire Update

Evaluate applications for employment and employment candidates. Make hiring determinations directly from the user submitted applications. List all applicants and note their status. Records are filled out by potential employees, and show their attention to detail as well as tracking their responses.

New Hire Update Create Labor Record

Personal Background

John Q Smith
Date 01/13/2010
 First Name Middle Initial Last Name SSN# 123-23-4345
Gender Male

Present Address 1 Main Street New York New York 10001-
 Street City State Zip Code
 Is Permanent Address Same as Present Address? Yes

Permanent Address 1 Main Street New York New York 10001-
 Street City State Zip Code

Home Phone Number (212) 555-5555 Referred By Expense Manager
 Cellphone Number (212) 555-5558

Position Applying For Technician Date You Can Start 01/13/2010 Annual Salary Desired \$45,000.00
 Years of Experience in Position 15 Experience Details Worked In Field For 15 Years
 (i.e. 18 months = 1.5 years)

Are you Currently Employed? Yes If so, may we inquire of your present Employer? Yes

U.S. Military or Naval Service Yes Branch / Rank Navy Discharge Disp. Honorable

If driving is a requirement of the job for which you are applying, do you have a current valid driver's license? Yes
 Please advise the status of your driver's license: 0 Points
 Driver's license status Valid Driver's license # 123234345 State Of Issue New York
 Classification NYS D. Passenger or Light Truck Issue Date 01/16/2008 Expiration Date 01/15/2016
 Eye Color Hazel Hair Color Brown Height 6'00"

Are you able, at any time of employment, to submit verification of your legal right to work in the U.S.? Yes
 Verification and completion of the I-9 form must be submitted no later than three business days after the date of hire.

Have you ever been convicted of a felony or a crime which is related to the functions or qualifications of the position for which you are applying? (A conviction record will not necessary be a bar to employment) No
 If Yes please describe fully the criminal conviction(s) listing the nature of offense(s) and your rehabilitation since the conviction(s)
 N/A

Educational Background References Work Experience Specialized Technical Skills
Documents Pictures Applicant's Statement Interview Status - Comment

Interview Status - Comment

Interview Status Selected

Interviewers Comments

The Candidate interviewed well. He will be a good new hire.

Application Comments

- C.7 Payment Source

Create and maintain a master record for each bank account that your company uses. Other system transactions add to and draw from these applications, keeping the information up-to-date and accurate.

Payment Source											
Account Information											
Bank Code	FULTON		Bank Name	Fulton Bank Money Market Acct							
Street	1 Penn Square										
P.O. Box		Floor/Suite		Area	Number						
City	Lancaster	County	Lancaster	Phone 1	(717)	555-1212					
State	Pennsylvania	Zip	17602-	Phone 2	(717)	555-1213					
Url	www.fulton.com			Phone 3	(717)	555-1214					
				Fax	(717)	555-1215					
<div> <div>Bank Information</div> <div>Transactions</div> <div>Reconciled Transactions</div> <div>Additional Transaction</div> <div>Void Transaction</div> <div>Pictures</div> <div>Documents</div> </div>											
Bank Information											
Contact Details											
Salutation	First Name	MI	Last Name	Title	Area	Number	Extension	Email			
1st	Ms.	Liz	Stehman	General Manage	(717)	555-1212	101	lstehman@email.com			
2nd	Mr.	Fritz	Herr	Accounting Dep	(717)	555-1212	102	fherr@email.com			
3rd	Miss	Jeannie	Cresh	General Manage	(717)	555-1212	103	jcresh@email.com			
4th	Mr.	Tiffany	Jewel	Vice President	(717)	555-1212	104	tjewel@email.com			
Other Account Info											
Account Type	Checking		ACH Type								
Account #	1234567890		ACH Origination Code								
Account Code	432566		ABA/ACH Routing #								
Account Open Date	06/26/2009		ACH Acct Type								
Account Close Date											
Over Draft Fee	\$45.00		Starting Check #	1							
Check Fee	\$0.00		Current Check #	4501							
Check Qty Allowed	10		Allow Manual Check	<input type="checkbox"/>							
			Allow Handwritten Checks	<input type="checkbox"/>							
			Starting Handwritten Check #	0							
			Current Handwritten Check #	0							
Cash Balances											
Opening Cash Balance				\$100,000.00							
Opening Cash Balance Date				06/26/2009							
Available Balance				\$100,566.76							
Current Financial Details											
Outstanding Deposits	\$216.76		Last Payment Amount	\$0.00							
Outstanding Payments	\$0.00		Last Payment Date								
Un-Reconciled Balance	\$216.76		Number of Checks	0							
Last Ledger Balance	\$100,350.00		Last Deposit Amount	\$216.76							
Last Reconciliation Date	12/17/2009		Last Deposit Date	12/21/2009							
Last Statement Balance	\$0.00										
Last Statement Date											
Check Book Information											
Check Book Name	Fulton Checkbook										
Fractional Route Number		First Transit Symbol		Second Transit Symbol							
Check Manufacturer	Deluxe Checks		Check Form Number	123abc							
Account Remarks											
This Fulton's downtown Lancaster branch and corporate offices.											

- C.8 Payment Terms Rules

Create and maintain an unlimited list of payment terms, based on fee and percentage as well as date and days. You can set the terms of your various transactions either on a specific date of the month, or a specific day in the week.

Payment Terms Rules

QueryFor-51187

Sales Payment Terms	Description	Group	
COD	Cash On Delivery	Standard	Acti
NET 240	Net 240	Standard	Acti
NET120	Net 120	Standard	Acti
NET30	Net 30	Standard	Acti

Legends: Current Cell: B4

☐ Details on scroll

Payment Header

Code: Description:

Group: Is Default?:

Applies to Sales: ☒ Applies to Purchase: ☒ Status: Is Cash on Delivery Term?:

Is Prepayment Term?:

Due Date Rule

Date or Days: # of Days:

Discount Rule

Discount Type: Date or Days:

None: None:

Documents **Pictures**

File Data	File Name	File Description

- C.9 Position Master

Create and maintain a record for each labor position. These records are available in the Labor Management application for selection when adding labor resources.

Position Master [EDIT]

Default Query

Code	
AM	Accounting Manager
ASC	Assistant Shipping Clerk
BK	Bookkeeper & Accounts Payable
DP	Draftsperson

[Legends](#) Current Cell : B8

☐ Details on scroll

Position Header

Position Name
Position Code Position Class

Position Details

Reports To
Work Center / Dept
Detailed Account Code

Phone 1 Start Effective Date
Phone 2 End Effective Date
Phone 3 Date Created

Additional Comments

Documents **Pictures**

File Data	File Name	File Description
-----------	-----------	------------------

- C.10 Tax Authority Maintenance

Create a record for each "municipality" or other taxing authority for which you will be required to collect taxes. You will also create a detailed vendor record if you pay collected taxes directly to this entity.

The screenshot shows the 'Tax Authority Maintenance' window. At the top, there's a title bar with the application name. Below it, a tab labeled 'Default Query for Tax Code Master' is active. A table lists tax authorities with columns for 'Code' and a description. 'NEW YORK STATE' is selected. Below the table, there are links for 'Legends' and 'Current Cell: B2', and a checkbox for 'Details on scroll'. The 'Tax Code Master Header' section contains input fields for 'Code' (NEW YORK STATE), 'Group' (State), 'Description' (New York State), and 'Detail Account Code' (T - Taxable). At the bottom, there are tabs for 'Documents' and 'Pictures', and a large empty table with columns 'File Data', 'File Name', and 'File Description'.

Code	
NEW YORK CITY	New York City
NEW YORK STATE	New York State
OKLAHOMA	Oklahoma
PENNSYLVANIA	Pennsylvania State Tax

Legends Current Cell: B2

☐ Details on scroll

Tax Code Master Header

Code: NEW YORK STATE Description: New York State

Group: State

Detail Account Code: T - Taxable

Documents Pictures

File Data	File Name	File Description
-----------	-----------	------------------

- C.11 Tax Rules Maintenance

Define specific tax rules which the **ServiceViews™** system will implement when selling services and/or materials within various jurisdictions. The system allows the updating of tax information in one location to affect the taxable outcome of the various transactions throughout the system.

Tax Rules Maintenance

Default Tax Rules Query

State	County	City	Zip Code	Customer Tax Status	Item Tax Status
NY				Taxable	Taxable
NY	New York	New York		Taxable	Taxable
OK				Taxable	Taxable
PA				Taxable	Taxable

Legends: Current Cell: B2

☐ Details on scroll

Tax Rule Details

Effective Start Date: 06/18/2009 Locality (RTD):

Effective End Date:

Customer Tax Class: Taxable State: New York

Item Tax Class: Taxable County: New York

Order Tax Class: * City: New York

Country: USA Zip Code:

Tax Rate Details

Tax Code 1: NEW YORK CITY	Tax Code 5:
Rate: 8.375	Rate: 0
Value Type: Percentage	Value Type:
Tax Code 2:	Tax Code 6:
Rate: 0	Rate: 0
Value Type:	Value Type:
Tax Code 3:	Tax Code 7:
Rate: 0	Rate: 0
Value Type:	Value Type:
Tax Code 4:	Tax Code 8:
Rate: 0	Rate: 0
Value Type:	Value Type:

Administration Department

- D.1 Absence Manager Approval

This application provides the ability for associated managers to approve or reject vacation and absence requests submitted by their subordinate employees. It also allows for the visibility of the request on the daily assignment schedules.

The screenshot shows the 'Absence Manager Approval' application window. It contains several sections for managing absence requests.

Default Query

First Name	Middle Initial	Last Name	Submit Date	Mgr Approval Status	# of Days Requested
AbsenceExpense		Employee	11/05/2009	Approved	15
AbsenceExpense		Employee	11/05/2009	Rejected / Cancellatio...	1
AbsenceExpense		Employee	11/05/2009	Rejected / Cancellatio...	1
AbsenceExpense		Employee	11/05/2009	Rejected / Cancellatio...	1

Legends: Current Cell : B7

☐ Details on scroll Page 1 of 4

Labor Information

Employee Code: MS-2 Employee Name: AbsenceExpense M.I.: Employee Last Name: Employee
Manager Code: MM-2 Manager Name: AbsenceExpense M.I.: Manager Last Name: Manager

Absence Request Information

Type of Absence: Vacation
Dates of Absence From: 11/01/2010 08:00 AM To: 11/15/2010 04:30 PM Submit Date: 11/05/2009
Reason for Absence: Total Days: 15 Holiday/Weekend Days: 4 Total Request Days: 11
test

Request Information Manager

Extra Paid Days: 0 Paid Days In Request: 11 Unpaid Days In Request: 0

Absence Type	Allowed Days	Year To Date	Days In This Request	Balance After Request	Outstanding Requests	Outstanding Requests (in days)
Vacation	18	-11	11	18	0	

Manager Approval Information

Status: Approved Action Date: 11/05/2009
Notes: Refresh Conflicts
test

Conflict Information

Originating Transaction	Event Type	Name	Start Date	End Date
-------------------------	------------	------	------------	----------

Company Approval Information

Approved By: AbsenceExpense M.I.: Company Last Name: Company Status: Approved
Approval Date: 11/05/2009 Paid Days In Request: 11 Unpaid Days In Request: 0
Notes: Company Extra Paid Days: 0

Application Comments

Administration Management

- E.1 Absence Company Approval

This application provides the ability for the company personnel manager, human resources (or other designated senior manager) to confirm vacation and absence requests for both direct senior reports, and to review approved or rejected requests from the supervisory level staff.

First Name			Middle Initial			Last Name		
Sean						Whitman		
Absence						Company		
Selma						McFadden		
Sean						Whitman		

Legends: Current Cell : B3

☐ Details on scroll

Labor Information

Employee Code	JD-2	Employee Name	First Name	M.I.	Last Name
			Selma		McFadden
Manager Code	RM-2	Manager Name	First Name	M.I.	Last Name
			Serena		Addison

Absence Request Information

Type of Absence:

Dates of Absence From: 08:00 AM To: 04:30 PM Submit Date:

Reason for Absence: 9 4 5

Vacation from Christmas Eve to New Year's because my children are off school.

Request Information Company

Absence Type	Allowed Days	Year To Date	Days In This Request	Balance After Request	Outstanding Requests	Outstanding Requests (in days)
Vacation	20	0	4	16	0	

Manager Approval Information

Status: Action Date:

Notes:

Company Approval Information

Approved By: First Name: M.I.: Last Name:

- E.2 Corporate Calendar Setup

This required table provides the ability to define the normal work days and hours, as well as overtime days, holidays and their associated rates. It allows you to denote holidays for various personnel, and displays them on the schedules in the system. It is used throughout the system to define the rates associated with the work performed on various transactions.

Corporate Calendar Setup

Default Query for Corporate Calendar

Code

DT
HT
OT
ST

[Legends](#) Current Cell : B2

☐ Details on scroll

Corporate Calendar Header

Code: HT
Description: Holiday

Is Standard Rate Code? No Is Holiday Rate Code? Yes

Rates Per Hour

Non-Contract Rate: \$300.00
Contract Rate: \$280.00
Average Cost Rate: \$100.00

Billing Information

Contract Time in Minutes: 240
Minimum Bill Time: 60
Non-Contract Time in Minutes: 240
Minimum Travel Time: 60

Eligible Times

Range Start Date	Start Time	Start Day	Is Full Day?	Range End Date	End Time	End Day	Override Conflicts?	Holiday Eligibility	Get
01/01/2010	12:00 AM	5 - Friday	Yes	01/01/2010	12:00 AM	5 - Friday	No	All	Get
01/16/2010	12:00 AM	6 - Saturday	Yes	01/16/2010	12:00 AM	6 - Saturday	No	All	Get
02/15/2010	12:00 AM	1 - Monday	Yes	02/15/2010	12:00 AM	1 - Monday	No	All	Get
04/05/2010	12:00 AM	1 - Monday	Yes	04/05/2010	12:00 AM	1 - Monday	No	All	Get
05/31/2010	12:00 AM	1 - Monday	Yes	05/31/2010	12:00 AM	1 - Monday	No	All	Get
07/05/2010	12:00 AM	1 - Monday	Yes	07/05/2010	12:00 AM	1 - Monday	No	All	Get
09/06/2010	12:00 AM	1 - Monday	Yes	09/06/2010	12:00 AM	1 - Monday	No	All	Get
11/25/2010	12:00 AM	4 - Thursday	Yes	11/25/2010	12:00 AM	4 - Thursday	No	All	Get
12/25/2010	12:00 AM	6 - Saturday	Yes	12/25/2010	12:00 AM	6 - Saturday	No	All	Get
01/15/2010	12:00 AM	5 - Friday	Yes	01/15/2010	12:00 AM	5 - Friday	No	All	Get

☐ Exclusions ☐ Gaps

Date	Start Day

Calendar Functions

Reset for Current Year Import Holidays

- E.3 Mileage Rate

Table for the setting of reimbursement rates for mileage, with rates capable of being assigned variable by date. Rates can be adjusted as the standards for those reimbursements change, and they can be applied per specific dates.

The screenshot shows the 'Mileage Rate' application window. It features a table with two columns: 'Start Date' and 'End Date'. The first row shows '01/01/2009' and '12/31/2009'. The second row, which is highlighted in blue, shows '01/01/2010' and '12/31/2010'. Below the table, there is a 'Legends' section with 'Current Cell : B2' and a checkbox for 'Details on scroll'. At the bottom, the 'Mileage Rate Details' section displays 'Mileage Rate' as 0.5, 'Start Date' as 01/01/2010, and 'End Date' as 12/31/2010.

- E.4. Sales Geography Maintenance

Use this application to define and configure sales territories or routes, or service areas by geographical location.

The screenshot shows the 'Sales Geography Maintenance [ADD]' application window. It has a 'Default Query' section with columns for 'Code', 'Filter', and 'Description'. Below this is a 'Legends' section with 'Current Cell :'. A checkbox for 'Details on scroll' is present. The 'Sales Geography Header' section contains fields for 'Sales Geography' (NYMETRO), 'Group' (North East), 'Description' (New York Metropolitan Territory), 'Parent Geography', 'Level No' (0), 'Status' (Active), and 'Zip Code' (01106-). At the bottom, there are tabs for 'Associated Geography Details (View Only)', 'Documents', and 'Pictures'. Below the tabs is a table with columns for 'File Data', 'File Name', and 'File Description'.

Employment

- F.1 Application for Employment

This application enables individuals who are applying for work with your company to create an electronic application for employment, and to attach substantiating and/or other supporting documentation to their record. Once again, the application is designed to allow candidates to fill in data, and shows attention to detail and a sense of accuracy for the review of your candidates.

Application For Employment				
Personal Background				
John		Q	Smith	Date 01/13/2010
First Name		Middle Initial	Last Name	SSN# 123-23-4345
				Gender Male
Present Address	1 Main Street	New York	New York	10001-
	Street	City	State	Zip Code
Is Permanent Address Same as Present Address? Yes				
Permanent Address	1 Main Street	New York	New York	10001-
	Street	City	State	Zip Code
Home Phone Number	(212) 555-5555	Referred By Expense Manager		
Cellphone Number	(212) 555-5558			
Position Applying For	Technician	Date You Can Start	01/13/2010	Annual Salary Desired \$45,000.00
Years of Experience in Position		Experience Details	Worked In Field For 15 Years	
(i.e. 18 months = 1.5 years)	15	Year(s)		
Are you Currently Employed? Yes				
If so, may we inquire of your present Employer? Yes				
U.S. Military or Naval Service Yes				
Branch / Rank Navy				
Discharge Disp. Honorable				
If driving is a requirement of the job for which you are applying, do you have a current valid driver's license? Yes				
Please advise the status of your driver's license: 0 Points				
Driver's license status Valid		Driver's license #	123234345	State Of Issue New York
Classification	NYS D. Passenger or Light Truck	Issue Date	01/16/2008	Expiration Date 01/15/2016
Eye Color	Hazel	Hair Color	Brown	Height 6'00"
Are you able, at any time of employment, to submit verification of your legal right to work in the U.S.? Yes				
Verification and completion of the I-9 form must be submitted no later than three business days after the date of hire.				
Have you ever been convicted of a felony or a crime which is related to the functions or qualifications of the position for which you are applying? (A conviction record will not necessarily be a bar to employment) No				
If Yes please describe fully the criminal conviction(s) listing the nature of offense(s) and your rehabilitation since the conviction(s)				
N/A				
Educational Background		References		Work Experience
Specialized Technical Skills		Documents	Pictures	Applicant's Statement
File Data	File Name	File Description		
	John Smith Photo.jpg	2010 Image Of John Smith		

Engineering Administration

- G.1 System Classification

Define categories, classifications and other qualifying names, groups or modifiers to adequately define the "product types" that your company sells and services. These classifications can be used to provide standardization throughout the client base.

System Classification		
QueryFor-51149		
Product Type	Class Code	
Fire Suppression Systems	DCSS	Dry Chemical Suppression System
Fire Suppression Systems	BCO	Bulk CO2 Suppression System
Fire Suppression Systems	CCO	Cylinder CO2 Suppression System
Fire Suppression Systems	GIS	Gas Island Suppression System
Fire Suppression Systems	FOAM	Foam Suppression System
Fire Suppression Systems	FM200	FM 200 Supression
Fire Suppression Systems	Halon	Halon Supression System
Fire Suppression Systems	Inergen	Inergen Fire Supression System
Security Systems	CCTV	Close Circuit Television
Security Systems	CA	Card Access
Security Systems	PS	Perimeter Security
Security Systems	COMBO	Combination
Sprinkler Monitor Systems	PA	Pre-Action Sprinkler System
Sprinkler Monitor Systems	DP	Dry-Pipe Sprinkler System
Sprinkler Monitor Systems	DL	Deluge Sprinkler System
Sprinkler Monitor Systems	WV	Wet Sprinkler System
Portable Fire Extinguishers	WH	Wheeled Fire Extinguishers
Portable Fire Extinguishers	HH	Handheld Extinguisher
Kitchen Suppression Systems	DC	Dry Chemical System
Kitchen Suppression Systems	WC	Wet Chemical System
Kitchen Suppression Systems	HPCO2	High Pressure Carbon Dioxide Kitchen System
Fire Hose Stations	WFH	Fire Hose System
Fire Alarm Systems	Class 'E'	Class E Voice Communication System
Fire Alarm Systems	Smoke System	Smoke Detection System
Fire Alarm Systems	IFA	Interior Fire Alarm
Fire Alarm Systems	Class 'J'	Class J Voice Communication System
Fire Alarm Systems	Class 'C'	Class C Interior Fire Alarm System
Fire Alarm Systems	MINIE	Mini "E" Voice Communication System
Fire Alarm Systems	CIFA	Coded Fire Alarm System
Fire Alarm Systems	VESDA	Very Early Smoke Detection Air Sampling
Fire Alarm Systems	CVFA	Coded Voice Communication System
Emergency Systems	SMP	Smoke Purge System
Emergency Systems	ECS	Emergency Control System
Emergency Systems	CO	Carbon Monoxide Systems
Emergency Systems	VP	Voice Communication And Paging
Legends Current Cell: B2 <input type="checkbox"/> Details on scroll		
System Type Details Product Type: <input type="text" value="Central Station Monitor Systems"/> Class Code: <input type="text" value="DCS"/> Class Description: <input type="text" value="Digital Central Office"/>		

Purchase Warehouse Administration

- 1.1 Asset Groups

Define and maintain top-level classifications, as well as secondary categories, for use with the Asset Maintenance and tool assignments. These asset groups allow for the filtration of various types of equipment in the corporation's possession.

The screenshot shows the 'Asset Groups' application window. At the top, there is a tab labeled 'Asset Group Default Query'. Below this is a table with two columns: 'Name' and 'Code'. The table contains the following data:

Name	Code
Cellular Phones	CELL
Information Technology	INFOTECH
Licenses And Permits	LICENSESPERMIT
Technician Tools	TOOL

Below the table, there is a 'Legends' section with the text 'Current Cell : B2'. To the right of the legends is a 'Details on scroll' checkbox, which is currently unchecked. Further right is a 'Page' indicator showing '1' of '1'.

Below the table, there is a 'Group Header' section. It contains two input fields: 'Group Code' with the value 'INFOTECH' and 'Group Name' with the value 'Information Technology'.

Below the group header, there is a 'Sub Groups' section. It contains a table with two columns: 'Sub Group' and 'Sub Group Name'. The table contains the following data:

Sub Group	Sub Group Name
BLACKBERRY	Blackberry Smart Phones
DESKTOP	Desktop PC's
LAPTOP	Laptop Computers
PRINTER	Printers
SERVER	Network Servers

At the bottom of the window, there is an 'Application' tab.

- 1.2 Asset Maintenance

Maintain records of company assets such as vehicles, tools, capital equipment, computers, etc. Track usage and service, as well as assignment to employees. It can also be used to assign daily components to various work tickets and equipment records.

Asset Maintenance					
Default Query BY Groups					
Asset Group	Asset Sub Group	Asset Code	Asset Name	MFG. Item Code	
Cellular Phones	Blackberry SmartPhone, Verizon ...	CURVE8230_01	Blackberry Curve 8320	456789	No
Information Technology	Desktop PC	DESKTOP-GW024	Gateway Desktop Pro-024	112233	No
Technician Tools	Manual Tools	SCKTWRENCH	Socket Wrench	23456	Yes
Vehicles					
	Automobiles	FOCUS01	Ford Focus Compact Sedan #1	97531	Yes
	Sport Utility Vehicles	EXPLORER04	2007 Explorer #4	00335577	No
	Trucks	RAM02	Dodge Ram Truck #2	0123456	Yes
	Vans	WINDSTAR01	Ford Windstar Mini-Van #1	789654	Yes

Legends Current Cell : B5

☐ Details on scroll

Asset Master

Code: FOCUS01 Group: Vehicles
 Name: Ford Focus Compact Sedan #1 Sub Group: Automobiles

Utilization & Maintenance Location History Allocation History Pictures Documents

General Data Sub Components Financial Data

General Data

Manufacturer Name: FORD Model Number: SE
 Manufacturer Part #: 97531 Serial Number: 998877002211
 Manufacturer Model: FOCUS Vendor: TOWE - Tower Ford

Date Purchased: 03/12/2008
 Date Received: 03/13/2008
 Date Commissioned:

Location Type: Employee

Employee: Sadie Calderon

Checked Out: Yes
 Date Last Used:
 Last Maintenance Date: 12/01/2009
 Next Maintenance Date: 12/01/2010

Asset Owner: GM-2 - James Hewing Notify Owner For Maintenance: Yes

Comments
 Comments about the use of company cars.

- 1.3 Inventory Movement

Execute and review inventory adjustments, transfers and other inventory movement, and quantity as well as the locations of inventory.

[illegible]

- 1.4 Item Maintenance

Create a database of inventory items including raw materials, finished goods, and show their status as active or discontinued. In addition, it allows for the collection of catalogue sheets as well as installation documents, drawings, and any other documents relevant to the item. Record shows the sales, purchase and general information data on each item.

Item Maintenance

QueryFor:51045 | Browse:1

Item Number	
DI-3	Ionization Detector (Se
DI-3H	High Alt Ion Detector
DI-3IS	Ionization Detector Intr

[Legends](#) Current Cell :

☐ Details on scroll

Item Header

Item Number: **DI-3** UPC Code:

Device Type: **CISD - Conventional Ionization Smoke Det** Manufacturer Model #: **DI-3**

Deliv. Priority: **3 = Alarm Devices (Detectors, Relays, M** Manufacturer Item #: **500-081806**

Status: **Active**

Type: **Regular** Resync Equipments

Description: **Ionization Detector (Series 3)** Alternate Description:

Detailed Description:

IONIZATION SMOKE DETECTOR

[Sales Pricing List](#) |
 [Item Purchases](#) |
 [Item Warehouse Views](#) |
 [Item Materials](#) |
 [Invoice Price History](#)

[General Data](#) |
 [Financial Data](#) |
 [Purchase Data](#) |
 [Sales Data](#) |
 [Pictures](#) |
 [Documents](#)

General Data

Primary UOM: **Each**

		Current Quantities		YTD Quantities	
Alternate UOM 1	<input type="text"/>	In Process	<input type="text" value="0"/>	Issues	<input type="text" value="0"/>
Factor	<input type="text" value="0"/>	On Hand	<input type="text" value="500"/>	Receipts	<input type="text" value="144"/>
Alternate UOM 2	<input type="text"/>	On Order	<input type="text" value="0"/>	Transfers	<input type="text" value="15"/>
Factor	<input type="text" value="0"/>	Demand	<input type="text" value="14"/>		
Alternate UOM 3	<input type="text"/>	Back Order	<input type="text" value="0"/>		
Factor	<input type="text" value="0"/>	Reserved	<input type="text" value="0"/>		
Alternate UOM 4	<input type="text"/>	Quoted	<input type="text" value="0"/>		
Factor	<input type="text" value="0"/>	On Hold	<input type="text" value="0"/>		

INDICATOR

Track On Hand	<input type="text" value="Yes"/>	Count Date	<input type="text"/>
Equipment Line Expansion	<input type="text" value="Yes"/>	System Count Date	<input type="text"/>
Is Serialized	<input type="text" value="No"/>	ABC Code	<input type="text" value="C"/>
Control Availability	<input type="text" value="Yes"/>		
Use Warehouse	<input type="text" value="Yes"/>		
Use Location	<input type="text" value="Yes"/>		
Use Lots	<input type="text" value="No"/>		
Use SKU	<input type="text" value="No"/>		
Minimum Stock Quantity	<input type="text" value="0"/>		
PM Mode	<input type="text" value="Purchased"/>		

NOTE:Track on hand can only be changed when on hand quantity is 0

- 1.5. Purchase Order Invoice

Reconcile invoiced prices and quantities received on purchase orders. The invoice is driven from the purchase order to ensure the cost structure assigned at the time of the purchase.

Purchase Order Invoice

Default

PO #	Invoice Number	Invoice Status	Total Amount	Received Date
200007	200007-INV001	Complete	\$210.00	12/22/2009
200008	200008-INV001	Complete	\$360.00	12/22/2009
200009	200009-INV001	Complete	\$100.00	12/22/2009
200010	200010-INV001	Complete	\$600.00	12/22/2009

Legends Current Cell: B3

☐ Details on scroll

Order Information

Order Type: Regular PO
 Order #: 200009
 Vendor Name: All A's
 Address: 1 Market Street
 City: New York State: New York Zip: 10001 Country: USA
 Phone: 212 555-5555 Extension: 101
 Contact: Mr. Gill Fischel
 Vendor Shipping: ☒ Requested By: Frances Exendine
 Line Amount: \$100.00 Tax Rate: 8.375%
 Tax: \$0.00 Is Taxable: ☐
 Discount: \$0.00
 Fee: \$0.00 Confirmation PO: ☐
 Total: \$100.00 Manually Complete PO: ☐

Credit Card Payment Information

Credit Card: ☐ Bank:
 Payment: ☐ Pay Amount: \$0.00 Pay Date:

Invoice Information

Invoice Code: 200009-INV001
 Status: Complete
 Last Payment Date: 12/22/2009
 Last Payment Amt.: \$100.00
 Total Applied Credit: \$0.00
 Total Payment Discount: \$0.00
 Amount Paid To Date: \$100.00
 Line Discount: \$0.00
 Line Fee: \$0.00
 Line Tax: \$0.00
 Line Post Amount: \$100.00
 Total Amount: \$100.00
 Resolve Contested Lines Without Debits?: ☐
 All Lines Posted: ☒

Vendor Invoice

Invoice #: ALLAS-INV-003
 Invoice Date: 12/22/2009
 Received By: Donna A Miller
 Received On: 12/22/2009
 Has Discount: No
 Discount Amt: \$0.00
 Has Fee: No
 Fee Amount: \$0.00
 Has Tax: No
 Tax Amount: \$0.00
 Invoice Amt: \$0.00
 Pay By Date: 12/22/2009
 Min. Pay Amt.: \$0.00
 Total Contested: \$0.00

Order Line Details

Original Cost	Unit Discount	Quantity	Balance Quantity	Invoiced Quantity	Cost Each	Extended Cost	Discount%	Discount Amount	Fee Amount	Tax Amount	Total Amount
\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00

Receipt Line Details

Quantity	Cost Each	Extended Price	Discount%	Discount Amount	Fee Amount	Tax Amount	Total Amount
0	\$0.00	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00

Item: Total Invoice Quantity: Total Receipt Quantity: Number Of Lines: Number Of Receipts:

Invoice Lines

Invoice Line Type	Invoice Line Status	Receipt #	Item / Service	Description	UOM	Received Quantity	Invoiced Quantity	Invoice Line Quantity	Un-Invoiced Quantity
Regular	Invoiced	200009-0001	1100	Conventional Ion Detector	EA	20	0	20	0

- 1.6 Purchase Order Maintenance

Prepare, maintain and review purchase orders for stock replenishment and services. Application can be designed for recurring purchase orders, for salable and infrastructure components. Purchase orders can be discounted, and show shipping as well as tax structure, requester and delivery dates.

Purchase Order Maintenance

Default Query

Order No	Order Type	Ordered From	Ordered On
200007	Purchase Order - Material	All A's	12/22/2009
200008	Purchase Order - Material	All A's	12/22/2009
200009	Purchase Order - Material	All A's	12/22/2009
200010	Purchase Order - Material	All A's	12/22/2009

Legends Current Cell: B2

☐ Details on scroll

Order Information

Type: Purchase Order - Material PO #: 200008
Status: Completed Promise Date: 12/23/2009
Date: 12/22/2009 Confirmation PO: ☐
Drawings? ☐ Reference:
Job Code:
Last Payment Date: 12/22/2009 Last Payment Amt: \$360.00 Paid To Date Amt: \$360.00

Vendor Information

Vendor: All A's
Pay Terms: COD - Cash On Del Allow Drop Ship? ☒
Address: 1 Market Street
City: New York County: New York
State: New York Zip: 10001- Country: USA
Phone: (212) 555-5555
Contact: Mr. Gill Fischel

Billing Information

Phone: (212) 555-0780 Contact: Donna Miller

Pricing Summary

Line Gross	\$360.00	Discount %	0%	Tax Rate	
Line Discount	\$0.00	Order Discount	\$0.00		8.375%
Line Fees	\$0.00	Order Fees	\$0.00		
Line Tax	\$0.00	Order Tax	\$0.00		
Line Net	\$360.00	Order Net	\$360.00		

Shipping Information

Drop Ship (Y/N) ☐ Hold For Release ☐ Can't Arrive Before
Address Type: Manual Vendor Shipping? ☒ Shipper Company:
Name: XLNT Software Solutions, Inc. Shipper Account #:
Address: 36 Warren St FOB:
City: New York County: New York Destination:
State: New York Zip: 10001- Country: USA Requested By:
Phone: (212) 555-0780 Contact: Noah Peters Frances Exendine
Ship Remark: Ordered By:

Discount to All Lines %

Type	Item Code	Description	Minimum Purchase Quantity	Purchase Multiple	UOM	Quantity	Received Quantity	Balance Quantity
Item	01G-3	3" Grooved End Butterfly Valve With Tamper S...	0	1	EA	4	4	0
Item	01G-4	4" Grooved End Butterfly Valve With Tamper S...	0	1	EA	6	6	0

Application: Comments:

- 1.7 Recurring PO

Set up weekly, monthly, semi-annual and annual recurring invoices such as utilities or rent. Automatically post to payables, or review in Purchase Order Invoice and then update to payables.

Recurring PO																																																			
Default Query <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Name</th> <th style="width: 30%;">Next Bill Date</th> <th style="width: 20%;"></th> </tr> </thead> <tbody> <tr> <td>Electrical Service</td> <td>01/01/2010</td> <td>ACTIVE</td> </tr> <tr> <td>New York Properties</td> <td>01/01/2010</td> <td>ACTIVE</td> </tr> <tr style="background-color: #000080; color: white;"> <td>Telephone And Internet</td> <td>01/01/2010</td> <td>ACTIVE</td> </tr> </tbody> </table>				Name	Next Bill Date		Electrical Service	01/01/2010	ACTIVE	New York Properties	01/01/2010	ACTIVE	Telephone And Internet	01/01/2010	ACTIVE																																				
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Legends: Current Cell : B3																																																			
<input type="checkbox"/> Details on scroll																																																			
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Service Code	Name	Rate	Fee	Discount	Tax																																														
TELE	Telephone Charges	\$100.00	\$0.00	\$0.00	\$0.00																																														

- 1.8 Ship Items

Create shipping manifests, containerize shipments and schedule shipments of goods.

Ship Items

Already Shipped Orders

Customer Code	Ship City
AC	New York
AC	New York
AE	New York

[Legends](#) Current Cell : B3

☐ Details on scroll

Order/Job Customer Details

Ship By

Customer Code

Company Name

Address

City

State Zip Country

Shipment Details

Shipment Type

Ship Via

Carrier Acct No Carrier Label No

Freight Cost Ship Date

Est Delivery Date Delivery Confirmation

Signature Confirmation Insured Value

Qty of Items Shipped

SordId	Item	Ship From	From Lot	From Warehouse	From Location
20000501G-4		Ship From		XLNTWARREN - ...	WARRENFRONT - ...
20000501G-3		Ship From		XLNTWARREN - ...	WARRENFRONT - ...

- 1.9. Shipper Maintenance

Create shippers, rates and zones. Maintain detailed shipper records for your delivery needs.

Shipper Maintenance

QueryFor-51220

Code	Name	Status	Account #
FEDEX	Federal Express	Active	113355
UPS	United Parcel Service	Active	002244

[Legends](#) Current Cell : B2

☐ Details on scroll

Shipper Info

Code	UPS	Class	All	Name	United Parcel Service
Status	Active	Low Zip Code	00000-	Fee Code	STANDARD
Account No	002244	High Zip Code	99999-	Fee Amount	\$1.25

[Service & Destination Attributes](#)

Zip Start	Zip Stop	Zone	UOM	Min Weight	Max Weight	Over Weight	Cost	Price
17601-	17608-	ZONE2_LANCCO	LB	100	499	500	\$1.25	\$1.95

- I.10 Vendor Debit Credit Maintenance

Debit a vendor or apply a vendor-provided credit. In the case of incorrect invoices or packing lists, the debit can be automatically generated based on the purchasing costs.

Vendor Debit Credit Maintenance

Default Query

Name	Reference	Reference Invoice	Amount	Unapplied Amount
All A's	200010	200012-INV001	\$80.00	\$0.00

Legends Current Cell : B1

☐ Details on scroll

Debit/Credit Information

Debit/Credit Issuing Type: Status:

Note Date:
 Vendor Reference #:
 PO Invoice Vendor #:

Name:
 Address:
 City: Country:
 State: Zip:
 Country: Phone:

Type:
 Transaction Type:

Amount:
 Unapplied Amount:

Additional Info

Credit Line Status	Vendor Invoice Code	Invoice Date	Invoice Due Date	Invoice Amount	Applied Amount	Invoice Balance	Remove	Comments
Complete	200711	12/22/2009	12/22/2009	\$80.00	\$80.00	\$0.00	<input type="checkbox"/>	Debit for contested amount on in

- I.11 Vendor Maintenance

Create and manage vendor records and details. Application defines the vendors for the company, as well as showing the items they provide and the vendor's purchase history, as well as a document tab to attach vendor proposals, and price lists to allow for system-wide access to review information based upon the needs of individuals to view data.

Vendor Maintenance
QueryFor-51063

Name	
ADI	ADI
AIJ Holdings	AIJH
Abalon Precision Mfg.	ABAL
Abercrombie-Fitzgerald Fire Protection	AFFP

[Legends](#) Current Cell: B1
☐ Details on scroll

Vendor Header

Code	ADI	Status	Active	Type	Purchase
Vendor Name	ADI				
Detail Acct Code	MA - Material Supplier				
On Order	\$0.00	Next Due Amount	\$0.00		
Un Invoiced	\$0.00	Next Due Date			
Open AP	\$0.00	Last Check Amount	\$0.00		
Closed AP	\$0.00	Last Check Date			
Total Liability	\$0.00	Last Discount	\$0.00		
Available Credit	\$0.00				

[Services](#)
[Purchase History](#)
[AP Ledger](#)
[Pictures](#)
[Documents](#)

[Purchasing Contact](#)
[Other Addresses](#)
[Items](#)

Purchasing Contact

Street	180 Michael Drive		Area Code	Phone Number
P.O. Box			First	(718) 357-3995
Floor / Suite			Second	
City	Syosset	County	Nassau	
State	New York	Zip Code	11791-	
Country	USA	Fax	(718) 357-4362	

Contact Information

	Salutation	First Name	M.I.	Last Name	Area Code	Phone #	Ext.	Title	Email
1st	Miss	Adrianne		Jones	(212)	555-5555	101	Salesman	demo@xlntinc.com
2nd	Mr.	Jim		Peterson	(212)	555-5555	102	Accounting De	demo@xlntinc.com
3rd									

Financial Information

Prior Year Purchases		Prior Year Payments		Year To Date Purchases		Year To Date Payments	
January	\$0.00	January	\$0.00	January	\$0.00	January	\$0.00
February	\$0.00	February	\$0.00	February	\$0.00	February	\$0.00
March	\$0.00	March	\$0.00	March	\$0.00	March	\$0.00
April	\$0.00	April	\$0.00	April	\$0.00	April	\$0.00
May	\$0.00	May	\$0.00	May	\$0.00	May	\$0.00
June	\$0.00	June	\$0.00	June	\$0.00	June	\$0.00
July	\$0.00	July	\$0.00	July	\$0.00	July	\$0.00
August	\$0.00	August	\$0.00	August	\$0.00	August	\$0.00
September	\$0.00	September	\$0.00	September	\$0.00	September	\$0.00
October	\$0.00	October	\$0.00	October	\$0.00	October	\$0.00
November	\$0.00	November	\$0.00	November	\$0.00	November	\$0.00
December	\$0.00	December	\$0.00	December	\$0.00	December	\$0.00
				Total Applied Credits			
				\$0.00			

Payment Terms Rule	NET30 - Net 30	Payment Method	Check
Payment Terms Days/Date	Days	Currency	
Payment Terms Day of Month	30	Is 1099?	No
Payment Discount Type	None		
Payment Discount Rate	0		
Payment Discount Days/Date	None		

Purchase Warehouse Department

- J.1 Purchase Order Receipt

Receive incoming goods, recognize discrepancies, and assign lots, warehouses, locations, quantities, etc. Prepare the system to create Accounts Payable invoices from posted receipts.

Purchase Order Receipt

Default Query

PO #	Receipt Number	
200007	200007-0001	12/22/2009
200008	200008-0001	12/22/2009
200009	200009-0001	12/22/2009
200010	200010-0001	12/22/2009

Legends: Current Cell: B2

☐ Details on scroll

Order Information

PO Number: 200008 Type: Purchase Order - Materi

Status: Complete

Order Date: 12/22/2009 Promise Date: 12/23/2009

Receipt Date: 12/22/2009 Receipt Number: 200008-0001

Job Code: Confirmation PO: ☐

Order Cost Information

Line Gross	\$360.00	Discount %	0%	Tax Rate	8.375%
Line Discount	\$0.00	Order Discount	\$0.00	Is Taxable	<input type="checkbox"/>
Line Fee	\$0.00	Order Fee	\$0.00		
Line Tax	\$0.00	Order Tax	\$0.00		
Line Net	\$360.00	Order Net	\$360.00		

Vendor Information

Vendor: ALLAS All A's

Payment Terms: COD - Cash On Deliv Allow Drop Ship? ☒

Address: 1 Market Street

City: New York County: New York

State: New York Zip: 10001- Country: USA

Phone: (212) 555-5555

Contact: Mr. Gill Fischel

Shipping Information

Drop Ship (Y/N) ☐ Hold For Release ☐ Can't Arrive Before

Vendor Shipping? ☒ Shipper

Name: XLNT Software Solutions, Inc.

Address: 36 Warren St

City: New York State: New York

Zip: 10001- County: New York Country: USA

Phone: (212) 555-0780 Contact: Noah Peters

Ship Remark:

Shipper Account #

FOB

Destination

Requested By: Frances Exendine

Ordered By: Frances Exendine

Billing Information

Phone: (212) 555-0780 Contact: Donna Miller

Credit Card Payment Information

Credit Payment ☐ Bank Pay Amount \$0.00 Pay Date

Receiving Notes

[Create Lots Records](#)

Line Details Warehouse Views

Item Code	Description	Order Quantity	Balance Quantity	UOM	Due Date	Receipt Quantity	Excess Quantity	Warehouse	War Lc
01G-3	3" Grooved End Butterfly Valv...	4	0EA		12/23/2009	4		0XLNTWARREN	WARRE
01G-4	4" Grooved End Butterfly Valv...	6	0EA		12/23/2009	6		0XLNTWARREN	WARRE

- J.2 Reserve Items

Reserve stock against a future order, or hold for quarantine or return.

Reserve Items			
Default Query			
			Item Code
DI-3			
Legends Current Cell :			
<input type="checkbox"/> Details on scroll			
Details			
Item	DI-3	Uom	Each
Reserve Qty	100	Reserve Date	12/24/2009
Reserve From Date	12/01/2009	Reserve End Date	12/28/2009
Reserve Note	Hold these detectors for Job #234-01		
Release Qty	0	Total Qty Released	0
		Balance Qty	100
Release Note			
Ware Mst Id	0	Ware Mst Code	
Ware Loch Id	0	Ware Loch Code	

Purchase Warehouse Management

- K.1 Alts Maintenance

Create industry cross-reference lists, synonymous names for parts, alternative names, etc.

Alts Maintenance

QueryFor-51110

Code	Description	
MDI-3	This Is The Item Code For Midwest Contracting	ITEMMST

[Legends](#) Current Cell : C1

☐ Details on scroll

Item Alternate Names

Alternate Code: MDI-3
Class: Midwest Contracting
Reference Source Type: Item Master
Status: Active
Item Or Other Master Code: DI-3 - Ionization Detector
Description: This Is The Item Code For Midwest Contracting

Create Details Edit Details

User: TREX Date: 12/24/2009

[Pictures](#) [Documents](#)

File Data	File Name	File Description
-----------	-----------	------------------

- K.2 Lots Management

Create and record lots, and manage items by lot number.

Lots Management [ADD]

Default

Item	
SPX9502	Keyswitch TS2 Default Lot

[Legends](#) Current Cell : B1

☐ Details on scroll

Lot Details

Name: 14276835

Item: SPX9502 Only items that are lot controlled can be selected.

Status: Active

Origination Date: 12/01/2009

From Date: 12/01/2009

End Date: 12/23/2010

Valid Days: 362

Attributes **IC Lots** **Pictures** **Documents**

Name	Label	Data Type	Value	Value UOM	Default Val
Pack	Package Quantity	Double	12	Dozen	12

- K.3 Warehouse Maintenance

Create records for physical warehouses and locations within warehouses. Describe dimensions of warehouse, as well as the creation of satellite or dependent warehouses, including mobile vehicle warehouses.

Warehouse Maintenance

QueryFor-51029

Code	Name
RAM02	Dodge Ram Truck #2
WINDSTAR01	Ford Windstar Mini-Van #1
XLNTCHRIS	"Satellite" Warehouse @ Christopher St Building
XLNTWARREN	Primary XLNT Warehouse @ Warren St

[Legends](#) Current Cell: B2

☐ Details on scroll

Warehouse Header

Code: WINDSTAR01 Warehouse Type: MOBILE WAREHOUSE Parent Warehouse Code: XLNTWARRI

Name: Ford Windstar Mini-Van #1

[Child Warehouse](#)
[Documents](#)
[Pictures](#)
[Warehouse Master Views](#)

[Warehouse Address](#)
[General Remarks](#)

Warehouse Address

Address:

City: New York State: New York Zip: 10001-

Country: USA

Area Code: Phone Number:

First: Second:

Area Code: Fax Number:

Fax:

Sal: First Name: Mr. Ashton MI: Last Name: Keating Title: Purchasing Agent

Contact Name: Mr. Ashton EMail: akeating@xlntinc.com Phone: (212) 555-0780 Ext: 16

Region: Account Code:

Warehouse General Info

Status: ACTIVE Size Uom: No Of Docks:

Height: Depth: Length:

Qty Uom: Capacity: Store Multi Part: ☒

Warehouse Location Details

Code	Location Name	Pos Uom	X Start	X End	Y Start	Y End	Z Start	Z End	Pos Rule	Size Uom
WINDSTAR01			0	0	0	0	0	0		

Sales Administration

- L.1 Job Templates

Create and maintain templates for use in the bidding of sales proposals and jobs, as well as service contract estimating from the base bid proposals. Templates also can delineate services required for any specific type of installation, either based on lump sum or hourly rate cost basis.

Job Templates

Default

Type	Code	Name
Device Based	FA-CIFA	Fire Alarm Coded FA System
Device Based	SMS-PA	Sprinkler Monitor Pre Action Sprinkler
Device Based	FS-INGREN	Fire Suppression Inergen
Device Based	SMS-DP	Sprinkler Monitor Dry Pipe

Legends: Current Cell : B3

☐ Details on scroll

Template Details

Code FS-INGREN
Type Device Based
Revision Number 4

Name Fire Suppression Inergen

Product Type Fire Suppression Systems

Classification Inergen - Inergen Fire Suppression System

Valid From Valid Till

Devices Documents Pictures

Device	Default Quantity
SA - Suppression Agent	1
IC - Inergen Cylinder	36
SSCP - Suppression System Control Pa...	1
SOLV - Solenoid/Electric Actuator	36
CMS - Conventional Manual Station	3
CISD - Conventional Ionization Smoke D...	18
SSC - Suppression Sub-Component	1
AVAD - Audio Visual Annunciation Dev...	8
MRS - Main To Reserve Switch	3
AMM - Addressable Monitor Module	3
SAS - Suppression Abort Station	3

- L.2 Sales Order Maintenance

Create and manage the sales order function. Includes point of sale, manual sales orders, and offers the ability to review of service contract, job, and work ticket sales order lines.

Sales Order Maintenance

Default Query

Code	Order Date	Customer Code	Order Description
MS200000	12/16/2009	AE	Sales Order - Material
MS200001	12/17/2009	ALPHA	Sales Order - Material
MS200007	12/17/2009	GAMMA	Sales Order - Material
MS200008	12/17/2009	BFCI	Sales Order - Material

Legends Current Cell: B2

☐ Details on scroll

Order Header

Order Type	Sales Order - Material	Code	MS200001	Order Date	12/17/2009	Gross Amount	\$390.00
Order Description		Promise Date	12/17/2009	Discount Amount	\$0.00	Tax Amount	\$32.67
Customer Code	ALPHA	Reference Code		Fees Amount	\$0.00	Net Amount	\$422.67
Order Status	Released	Is Sales Order Entry Finished?		<input type="checkbox"/>			

Order Billing Details

Payment Terms: NET30 ☒ IsTaxable

Stored Code: 1 Main Street - James Alpha

Name: Alpha Corporation

Street: 1 Main Street

P.O. Box:

Floor / Suite:

City: New York County: New York

State: New York Zip: 10001-

Phone: (212) 555-5555 Contact: Mr. James Alpha

Order Shipping Details

Delivery Required By: Can't Arrive Before:

Customer Pickup: ☐

Stored Code: 1 Main Street

Name:

Street: 1 Main Street

P.O. Box:

Floor / Suite:

City: New York County: New York

State: New York Zip: 10001-

Phone: (212) 555-5555 Contact: Mr. James Alpha

Ship All ☐

Order Lines

Type	Item Code	Description	Quantity	UOM	Due Date	Unit Price	Discount %	Discount Unit Price
Item	01G-3	3" Grooved End Butterfly Valve With Ta...	3	Each		\$70.00	0%	\$
Item	01G-4	4" Grooved End Butterfly Valve With Ta...	2	Each		\$90.00	0%	\$

- L.3 Sales Pricing Rules

Define pricing rules for items and services to be sold to various client types including service customers, competitors, preferred competitors, as well as any other definition which any client can define.

Sales Pricing Rules

List of Sales Pricing

Pricing Code	Description	Pricing Method	Item Class	Customer Class	Order Type
I-BIDCD	Bid,Proposal	Cost Based	Dis-Continued	Competitor	Bid , Proposal
I-BIDCS	Bid,Proposal	Cost Based	Standard	Competitor	Bid , Proposal
I-BIDPCD	Bid,Proposal	Cost Based	Dis-Continued	PreferredCompetitor	Bid , Proposal
I-BIDPCS	Bid,Proposal	Cost Based	Standard	PreferredCompetitor	Bid , Proposal

Legends: Current Cell : B2

☐ Details on scroll

Sales Pricing Header

Pricing Rule Type: **Item**

Pricing Code: **I-BIDCS**

Name: **Bid,Proposal**

Status: **Active**

Pricing Method: **Cost Based**

Price/Cost Percentage

Price/Cost % 1	228.55
Price/Cost % 2	0
Price/Cost % 3	0
Price/Cost % 4	0
Price/Cost % 5	0
Price/Cost % 6	0
Price/Cost % 7	0
Price/Cost % 8	0
Price/Cost % 9	0
Price/Cost % 10	0

Price Adjustment: **\$0.00**

Discount Rate 1: **0**

Discount DAC 1: **0**

Discount Rate 2: **0**

Discount DAC 2: **0**

Item Price Class: **Standard**

Customer Price Class: **Competitor**

Order Type: **Bid , Proposal**

Quantity Low: **0**

Quantity High: **1000**

Price Low: **\$0.00**

Price High: **\$1,000.00**

Original Date: **08/09/2005**

Effective Start Date: **08/09/2005**

Effective End Date: **0**

Documents **Pictures**

File Data	File Name	File Description
-----------	-----------	------------------

- L.4 Service Contract

Defines the approved and confirmed Service Contracts along with their details including the end user, bill to and site, as well as the estimated costs for the services which have been agreed to by the customer.

Service Contract									
Take Off Sheet		Terms & Conditions		Replacements / Spares		Pictures		Documents	
Equipment Details			Contract Info		Contract Summary		Override Rates		
Site Info									
Site Code	AC-8TH-SITE1121			Contact Information					
Site Name	Albertson-8th Ave			Salutation	First Name		M.I.	Last Name	
Address	605 8th Avenue			Miss	Bess			Smith	
CrossStreet	6th Street			Area	Phone #				
City	New York	County	New York	Phone	212	555-5555	Ext	101	
State	New York	Zip	10001-	Cell Phone	718	555-6667			
Equip Info									
Equip Code	AC-SITE-1121-EQUIP-1			Service Pri AHJ	New York City Fire Department				
Product Type	Fire Alarm Systems			Manufacturer					
System Class	CIFA - Coded Fire Alarm System			Primary Technician	NP-2 - Noah Peters				
Service Co.	Albertson Contracting			No Of Floors	0				
Floor	Lobby	Area Served	NTC Indoor Venue						
Job#		Salutation	First Name	M.I.	Last Name	Area	Phone #	Ext	
Contact Information	Mr.		John		Doe	111	111-1111	101	
Devices									
Device		Service Frequency	Actual Qty	Expand Lines	Template Qty	Total Floor Qty	Total		
AISD - Addressable Ion Smoke Detector		Annual	3	<input checked="" type="checkbox"/>	0	0			
Services									
Service Code	Description	IsRequired	Number of Devices	Minutes Per Device					

Service Contract									
Take Off Sheet		Terms & Conditions		Replacements / Spares		Pictures		Documents	
Equipment Details		Contract Info		Contract Summary		Override Rates			
Contract Bill To				Contract Contact Info					
Customer	AC			Salutation	Mr.				
Payment Terms	NET30			First Name	M.I.	Last Name			
Name	Albertson Contracting			Rich		Aikens			
Street	505 Madison Ave			Area	Phone #		Ext		
P.O. Box				212	555-0660		101		
Floor / Suite	3rd Floor			Area	Fax #				
City	New York	County	New York	212	555-9760				
State	New York	Zip	10017-	Email	demo@xlntinc.com				
Contact Information				Location	505 Madison Ave				
Salutation	First Name	M.I.	Last Name	Company Name	Albertson Contracting				
Mr.	Rich		Aikens						
Contract Details									
Type	Contract			Contract #	1001-SC2010				
Total # of systems	3			System #	1001-SC2010-01				
Has Proposal been generated?	<input type="checkbox"/>			Submit Proposal Via	Fax & Mail				
Sales Rep	GM-2-James - Hewing			Multiple Work Tickets	Contract Duration				
AHJ Recommended Service Frequency	Annual				3 Year				
Billing Frequency	Annual			# of Incidents	3		Contract Start Date		
Service Visit	Annual			# of Techs per Incident	1		Contract End Date		
# of Techs / Service	1			Hours per Incidents	3		Contract Renewal Date		
				Rate Code per Incident	ST - 140		11/03/2012		
				Rate per Incident	\$140.00				
Closing Info									
Contract Status	Active			P.O. #	PO#15243				
Submit Date				Under Bid By Whom					
Closing Date	12/16/2009			Under Bid By Amt	0				
Authorized Via	Fax & Mail			Reason					
Authorized Name									
Salutation	First Name	M.I.	Last Name						
Mr.	Rich		Aikens						
Total (x) Year(s) Price	\$18,915.00								
Authorized Amount	\$18,500.00								
Authorized Markup	235.53%								
Authorized Profit	\$12,986.28								
Comments									

Service Contract									
Take Off Sheet		Terms & Conditions		Replacements / Spares		Pictures		Documents	
Equipment Details		Contract Info		Contract Summary		Override Rates			
Contract Summary									
Device Time & Costs									
Device Type	Times per Year	# of Devices	Minutes per Device	Subtotal hours	Avg. Cost per Device	Total Cost			
Addressable Ion Smoke Detector	Annual	3	13	0.65	\$13.00	\$39.00			
<div> <div> Contract Rates Contract Rate Code: <input type="text" value="ST - 60"/> Contract Rate: <input type="text" value="\$60.00"/> Min Bill Time: <input type="text" value="0"/> Min Travel Time: <input type="text" value="0"/> </div> <div> System Costs Total Devices: <input type="text" value="3"/> Total Hours: <input type="text" value="0.65"/> Service Costs: <input type="text" value="\$39.00"/> Item Costs: <input type="text" value="\$0.00"/> Free Service Cost: <input type="text" value="\$540.00"/> Total Cost: <input type="text" value="\$579.00"/> </div> </div>									
<div> <div> Contract Web Access Allow Web Access: <input type="text" value="Yes"/> Web Fee Type: <input type="text" value="Unit Pricing"/> Lump Sum Threshold: <input type="text" value="0"/> Web Access Fee: <input type="text" value="\$100.00"/> </div> <div> System Minimum Selling Price Markup %: <input type="text" value="225%"/> Profit Amount: <input type="text" value="\$1,302.75"/> Total Amount: <input type="text" value="\$1,881.75"/> </div> <div> System Selling Price Markup %: <input type="text" value="228.15%"/> Profit Amount: <input type="text" value="\$1,321.00"/> Total Amount: <input type="text" value="\$1,900.00"/> </div> </div>									
Yearly Cost / Price									
	Net Service Cost	Net Item Cost	Net Web Access Cost	Net Free Service Cost					
	<input type="text" value="\$129.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$300.00"/>	<input type="text" value="\$1,620.00"/>					
	Yearly Increase By	Cost	Price	Markup%	Profit				
Year 1	<input type="text" value="5%"/>	<input type="text" value="\$1,749.00"/>	<input type="text" value="\$6,000.00"/>	<input type="text" value="243%"/>	<input type="text" value="\$4,251.00"/>				
Year 2	<input type="text" value="0%"/>	<input type="text" value="\$1,836.45"/>	<input type="text" value="\$6,300.00"/>	<input type="text" value="243%"/>	<input type="text" value="\$4,463.55"/>				
Year 3	<input type="text" value="5%"/>	<input type="text" value="\$1,928.27"/>	<input type="text" value="\$6,615.00"/>	<input type="text" value="243%"/>	<input type="text" value="\$4,686.73"/>				
Year 4	<input type="text" value="0%"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="0%"/>	<input type="text" value="\$0.00"/>				
Year 5	<input type="text" value="0%"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="0%"/>	<input type="text" value="\$0.00"/>				
Total (x) Year(s)		<input type="text" value="\$5,513.72"/>	<input type="text" value="\$18,915.00"/>	<input type="text" value="243%"/>	<input type="text" value="\$13,401.28"/>				
All Systems									
System #	Equipment	Total Devices	Contract Hours	System Service Cost	System Item Cost	System Free Service Cost	Total System Cost	Total System Price	Web Access Fee
		16	2.15	\$129.00	\$0.00	\$1,620.00	\$1,749.00	\$5,700.00	\$0.00
1001-SC201...	AC-SITE-112...	3	0.65	\$39.00	\$0.00	\$540.00	\$579.00	\$1,900.00	
1001-SC201...	AC-SITE-200...	10	1.15	\$69.00	\$0.00	\$540.00	\$609.00	\$1,900.00	
1001-SC201...	AC-SITE-629...	3	0.35	\$21.00	\$0.00	\$540.00	\$561.00	\$1,900.00	

Sales Department

- M.3 Service Contract Proposal

Create, specify and manage the information and details from your service contract requests, and update to a firm proposal. Application allows you to calculate based upon pre-defined costs, as well as to carry additional costs for items which have a higher degree of difficulty, should the need arise.

Service Contract Proposal [ADD]

Take Off Sheet | Terms & Conditions | Replacements / Spares | Pictures | Documents

Equipment Details | **Contract Info** | Proposal Summary | Override Rates

Contract Bill To
Customer: ENC
Payment Terms: NET30
Name: Eurasian National Consulate
Street: 38 W 33rd St
P.O. Box:
Floor / Suite:
City: New York County: New York
State: New York Zip: 10016-
Contact Information
Salutation: Ms. First Name: Lolita M.I.: Last Name: Estevez

Contract Contact Info
Salutation: Ms.
First Name: Lolita M.I.: Last Name: Estevez
Area: 212 Phone #: 555-4646 Ext: 101
Area: 212 Fax #: 555-6464
Email: demo@xlntinc.com
Location: 38 W 33rd St
Company Name: Eurasian National Consulate

Contract Details
Type: Amendment Amend Contract #: 1005-SC2010 Proposal Date: 12/16/2009
Total # of systems: 1 Proposal #: 1005 Proposal Valid Until: 01/15/2010
of Systems to add: 0 System #: Submit Proposal Via: Fax & Mail
Sales Rep.: GM-2 - James Hewing
AHJ Recommended Frequency: Annual Type of Incidents: Single WorkTicket Contract Duration: 2 Year
Billing Frequency: Semi-Annual # of Incidents: 3 Contract Start Date: 01/04/2010
Service Visit: Annual # of Techs per Incident: 1 Contract End Date: 01/03/2012
of Techs / Service: 1 Hours per Incident: 2 Contract Renewal Date: 11/03/2011
 Rate Code per Incident: ST - 140
Rate per Incident: \$140.00

Closing Info
Proposal Status: Open
Submit Date:
Closing Date:
Authorized Via:
Authorized Name:
Salutation: First Name: M.I.: Last Name:
Total (x) Year(s) Price: \$5,535.00
Authorized Amount: \$0.00
Authorized Markup: 0%
Authorized Profit: \$0.00
Comments:
P.O. #:
Under Bid By Whom:
Under Bid By Amt: \$0.00
Rejection Reason:

Service Contract Proposal [ADD]

Take Off Sheet Terms & Conditions Replacements / Spares Pictures Documents

Equipment Details Contract Info Proposal Summary Override Rates

Site Info

Is New Site?

Site Code

Site Name

Address

Cross Street

City County

State Zip

Contact Information

Salutation First Name M.I. Last Name

Area Phone # Ext

Phone Cell

Equip Info

Is New Equipment?

Equip Code

Product Type

System Class

Service Company

Floor Area Served

Job #

Salutation First Name M.I. Last Name

Service Primary AHJ

Manufacturer

Primary Technician

No of Floors

Equip Template

Panel Location

Area Phone # Ext

Devices

Device	AHJ Frequency	Service Frequency	Equipment Quantity	Actual Qty	Expand Lines
Addressable Ion Smoke Detector - AISD	Annual	Annual	30	30	<input checked="" type="checkbox"/>
Audio Alarm Device - AAD	Annual	Annual	1	1	<input type="checkbox"/>
Conventional Control Systems - CCS	Annual	Annual	1	1	<input checked="" type="checkbox"/>
Fire Alarm Sub-Component - FSC	Annual	Annual	1	1	<input type="checkbox"/>

Services (Addressable Ion Smoke Detector - AISD)

Service Code	Description	Is Required	Number of Devices	Minutes Per Device
ADS	Addressable Detector Sensitivity	Yes	30	2
DC	Detector Cleaning	Yes	30	3
VIN	Visual Inspection	Yes	30	2

Service Contract Proposal [ADD]									
Take Off Sheet		Terms & Conditions		Replacements / Spares		Pictures		Documents	
Equipment Details			Contract Info		Proposal Summary		Override Rates		
Device Time & Costs									
Device Type	Times per Year	# of Devices	Minutes per Device	Subtotal hours	Avg. Cost per Device	Total Cost			
Addressable Ion Smoke Detector	Annual	30	7	3.5	\$7.00	\$210.00			
Audio Alarm Device	Annual	1	5	0.08	\$5.00	\$5.00			
Conventional Control Systems	Annual	1	18	0.3	\$18.00	\$18.00			
Fire Alarm Sub-Component	Annual	1	5	0.08	\$5.00	\$5.00			
Contract Rates				System Costs					
Proposal Rate Code	ST - 60			Total Devices	33		Service Costs	\$238.00	
Proposal Cost Rate	\$60.00			Total Hours	3.96		Item Costs	\$0.00	
Min. Bill Time	0						Free Service Cost	\$360.00	
Min. Travel Time	0						Total Cost	\$598.00	
Contract Web Access				System Minimum Selling Price					
Allow Web Access	Yes			Markup %	50%		System Selling Price	Markup %	
Web Fee Type	Unit Pricing			Profit Amount	\$299.00			318.06%	
Lump Sum Threshold	0			Total Amount	\$897.00		Profit Amount	\$1,902.00	
Web Access Fee	\$200.00						Total Amount	\$2,500.00	
Yearly Costs / Price				Work History					
				Net Service Cost	\$238.00		Net Web Access Cost	\$200.00	
				Net Item Cost	\$0.00		Net Free Service Cost	\$360.00	
Yearly Increase By	5%			Cost			Price	Markup%	
01/04/2010 - 01/04/2011	0%			\$598.00			\$2,700.00	351%	
01/04/2011 - 01/03/2012	5%			\$627.90			\$2,835.00	351%	
Year 3	0%			\$0.00			\$0.00	0%	
Year 4	0%			\$0.00			\$0.00	0%	
Year 5	0%			\$0.00			\$0.00	0%	
Total (x) Year(s)				\$1,225.90			\$5,535.00	351%	
All Systems (Note: Values refresh after saving record)									

Sales Management

- N.1. Terms and Conditions Maintenance

Maintain a record for the standard and non-standard terms to be included with each transaction type. Standard terms can be pulled in at the various transaction levels and then be modified at the individual level.

Terms and Condition Maintenance

DefaultQuery

Terms Used In	Description
Purchase Order - Material	General Terms For Material Purchase Order
Purchase Order - Service	Architectural Services
Purchase Order - Service	Filing Purchase Order
Purchase Order - Service	Purchase Order Electrical Contractor

[Legends](#) Current Cell : B1

☐ Details on scroll

Rule Details

Rule Code: **MATERIALPO** Description: **General Terms For Material Purchase Order**

Is Standard Term: **Yes** Transaction Type: **Purchase Order - Material**

Is Term Editable: **Yes** Applicable to:

Note

Select Predefined Note: **MATERIALPO - Material Order Terms - Ed** ☐ Make a copy of Note

Note Code: **MATERIALPO** ☒ Is Editable

Description: **Material Order Terms - Equipment Only**

Arial 10 **B I U** Default

1. Refer all inquiries regarding this order to buyer
 2. Order is to be entered in accordance with price, delivery, and specifications
 3. All shipments must contain a packing slip that identifies purchase order number part number and quantity shipped.
 4. All changes or exceptions to this order must be made in writing
 5. All shipments are for immediate delivery unless otherwise specified.
 6. The buyer is to be notified immediately of any condition that would delay this order in any way (ex. credit or stock issues).
 7. All skidded shipments must be delivered in a straight truck with a lift gate.
 8. No tractor trailer shipments will be accepted, and all rerouting fees incurred from this will be the responsibility of the shipper.
 9. Shipper must be able to provide tracking information upon request.

File Data	File Name	File Description
-----------	-----------	------------------

Service Administration

- O.1 Auto Work Ticket Generation

Define an evaluation range and launch Automated Work Tickets. Application provides a view of all eligible inspection tickets, along with any problems or issues associated with the record including open tickets, work remaining, and credit statuses derived from their equipment records.

Auto Work Ticket Generation [EDIT]

Default

Status	Name	Range Start
Pending	Q1 Inspection	01/06/2010

Legends: Current Cell:

☐ Details on scroll

Range Selection

Status: Equipment:

Name: Auto WVT Number:

Start Date: End Date:

Equipments

Equip #	Equipment Name	Site Address	Contact	Phone Number	Product Type	Classification	Device Type	
AE-SITE-200...	Armada Electrical		Mr. John Doe	111-111-1111	Fire Alarm Systems	Class J Voice Co...	AISD	Add
							CISD	Com
							CMS	Com
							CPSC	Cont

TREX-UBB Info - Auto Work Ticket Generation

Work Order(s) and Log book(s) generated successfully!

- O.2 Equipment Line Change

Initiate changes to equipment master records from this application. Modify line details, add or delete devices from systems, and otherwise modify equipment device line details.

Equipment Line Change [EDIT]

Default

Code	Name
AC-SITE-1121-EQUIP-1	Albertson Contracting
AC-SITE-200027-EQUIP-3	Albertson Contracting
AC-SITE-629-EQUIP-2	Albertson Contracting
AE-SITE-200085-EQUIP-1	Armada Electrical

[Legends](#) Current Cell : B4

☐ Details on scroll

Equipment Master Info

Equipment Code:

Service Contract No:

Customer:

Site:

Product Type:

System Classification:

Equipment Line	Seq No	Model No	Device	Manufacturer	Quantity	Location
10-10507-D - -	10	10507-D	CMS - Convention...	Faraday	1	

- O.3 Equipment Log Book

Record details of an inspection in the equipment log book and make notations on the equipment based upon pre-defined system attributes. This application establishes for the field personnel the basis to inspect repetitive items, to ensure the consistency of the inspection process.

Equipment Log Book

Default

Equipment	Date	Status	
AE-SITE-200085-EQUIP-1	12/28/2009	Active	-2nd Floor-2nd-J

Legends: Current Cell: B1

☐ Details on scroll

Log Details

Equipment Code: AE-SITE-200085-... Status: Active

Name: -2nd Floor-2nd-Annual-January 2010

Service Co. Name: Armada Electrical

Classification: Class J Voice Communication System Item Discrepancy? No

Actual Inspection Date: 12/28/2009

NOTE: Please do not edit lines and complete the log book at the same time.

Adjust Lines Worksheet

Device Logs

Enter a seq no: 1 Prev Seq No. << Next Seq No. >>

Log Book WorkSheet (AE-SITE-200085-EQUIP-1) Armada Electrical - DISPLAY

Seq No	Device	Model #	Serial #	Location	Technician	Certificate	Inspected On
5	Addressable Ion Smoke Detector	1151					
6		1151					
7		1151					
12	Control Panel Sub Components	101-SPK					
2	Conventional Ionization Smoke De...	1100					
3		1100					
8		1100					
9		1100					
1	Conventional Manual Station	10507-D					
4		10507-D					
10		10507-D					
11		10507-D					

Close

- O.4 Equipment Maintenance

Create, maintain, and edit specific systems and device details for each system that you maintain or have installed. Provide a repository for recording documents, as well as storing comments on individual systems and products. This application allows you to attach drawings and correspondence relevant to the individual equipment.

Equipment Maintenance

Equipment Name and Inspection Dates

Contract Status	Service Co. Name	Equipment #	Last Insp. Date	Service Frequency	Next Insp. Date
Service Contract	Albertson Contracting	AC-SITE-1121-EQUIP-1		Annual	01/06/2010
Service Contract	Albertson Contracting	AC-SITE-629-EQUIP-2		Annual	01/06/2010
Service Contract	Armada Electrical	AE-SITE-200085-EQUIP-1		Annual	01/06/2010

Legends: Current Cell: D3

☐ Details on scroll Page 1 of 1

Main Info

Equipment Code	AE-SITE-200085-EQUIP-1	Job Info	Service Info	Print Report	Reset Attributes	Schedule
Product Type	Fire Alarm Systems					
Classification	Class J Voice Communication					
Customer Name	AE	Service Contract #	1002-SC2010	Service Location		
Site Code	AE-116TH-SITE200085	System Contract #	1002-SC2010-01	Service AHJ 1		
Service Co. Name	Armada Electrical	Start Date	01/04/2010	Service AHJ 2		
Contract Status	Service Contract	End Date	01/03/2013	Last Inspection Date		
Primary Technician	NP-2 - Noah Peters	Contract Reminder	11/04/2012	Next Visit Date	01/06/2010	
Installation Date	12/14/2009	Proposal Status	Accepted	Central Office		
Installation AHJ	New York City Fire Departme	Proposal Date	12/16/2009	Central Phone		
Alternate AHJ		Billing Frequency	Semi-Annual	Central AcctNo		
Bill Status	Maintenance	Service Frequency	Annual			
Vendor						
Manufacturer						
Model #						
Serial #						
Floor	2nd	Area Served	2nd Floor	Panel Location	2nd Floor Mechanical Room	
Special						
Considerations						

Job Change Orders | Job Project Progress Status | Job Purchase Order | Documents | Pictures

Site Info | Customer Info | Device Summary | **Device Details** | Inspection Tools | Service Eligibility and Times | History

Sequence No	Model No	Device	Manufacturer	Quantity	Location	Serial Number	Ins Fre
1	10507-D	Conventional Man...	Faraday	1			Annual
2	1100	Conventional Ioni...	System Sensor	1			Annual
3	1100	Conventional Ioni...	System Sensor	1			Annual
4	10507-D	Conventional Man...	Faraday	1			Annual
5	1151	Addressable Ion ...	Ansul	1			Annual
6	1151	Addressable Ion ...	Ansul	1			Annual
7	1151	Addressable Ion ...	Ansul	1			Annual
8	1100	Conventional Ioni...	System Sensor	1			Annual
9	1100	Conventional Ioni...	System Sensor	1			Annual
10	10507-D	Conventional Man...	Faraday	1			Annual
11	10507-D	Conventional Man...	Faraday	1			Annual
12	101-SPK	Control Panel Sub...	Siemens	4			Annual
13	101-STRB	Control Panel Sub...	Siemens	2			Annual

Application | Comments

- 0.5 Work Remaining Approval

Edit and review auto-created work remaining approval records, and generate work remaining approval letters from Work Tickets that have their "Work Finished" attribute set to No. Includes "out-of-scope" work which remains on Maintenance Tickets. Application defines scope in the ticket so there is no miscommunication as to the work required, which is then defined in the letter.

Work Remaining Approval [EDIT]

Application

WorkTicket Info

Work Order # 215192-1
Order Type Time and Material - Work Ticket
Originating PO Number PO#25492

Work Approval General Info

Code WR-215192-1
Request Date
Submit Date
Service Provider Contact
Reference Portable/Fire Extinguishers
Submit via

Submittal Address

Customer Code AEC
Name Alltech Electrical Contracting
Stored Address
Address 102 North Liberty St.
City Staten Island County Richmond
State New York Zip 10314-
Country USA

Site Address

Site AEC-MAIN-SITE630
Name Alltech Main Office
Cross Street 14th Street
Address 750 Fourth Avenue
City New York County New York
State New York Zip 10017-
Country USA

Contact Information

Salutation First Name M.I. Last Name
Ms. Stacy Lake
Area Phone Number Ext Area Fax Number
718 444-3030 101 Fax 718 444-0303
Email demo@xlntinc.com

Assessment Services Description

Assessment Date 12/24/2009
Assessment of Problem
Perform Review of all systems; note any future requirements

Proposed Resolution

Several repairs and new Suppression system required

Duration and Proposed Date of Completion

Application Comments

Service Department

- P.1 Call Information Sheet

Record incoming requests for service or materials from end users, equipment contacts or site owners. Application allows you to track all calls and their assignment. Work tickets can be driven by the application, which tracks the ticket to conclusion.

Call Information Sheet									
Caller Information									
First Name M.I. Last Name Caller Name Mr. John Doe			Call Number 200000						
Caller Company Zeta Corporation			Call Date 12/23/2009						
Caller Phone # (111) 111-1111 Ext 101			Find Caller Information Clear		Call Status Complete				
Equipment / Site Information									
Equipment ZETA-SITE-1-EQUIP-1			Site Address Zeta Corporation Main Offices						
Product Type Fire Alarm Systems			1 Grand Street						
Classification Interior Fire Alarm									
Manufacturer Viking			City New York		County New York				
Service Co. Zeta Corporation			State New York		Zip 10001-				
Location Electrical Room			Cross Street Houston Street						
Floor GROUND FLO			Equipment Contact Information						
Job Number			Salutation Mr.		First Name John		M.I. Doe		
Service File #			Phone # (111) 111-1111 Ext 101						
Contract Type No Contract			Find Equipment and Site Clear						
Primary Technician NP-2 - Noah Peters									
Was system installed within last 12 months? No									
Who is This Being Billed To?									
Is a New Customer? No			Contact Information						
Has new account processed? Yes			Salutation Mr.		First Name Abe		M.I. Zeta		
Name Zeta Corporation			Customer Phone # 212 555-5555 Ext 101						
Street 1 Grand Street			Customer Reference i.e. PO, EM, PM#						
P O Box									
City New York County New York			Is Customer Credit Good? Yes						
State New York Zip 10001-			Reason for Credit Failure						
Add Customer Find Customer Clear									
<div style="display: flex; justify-content: space-between; border-top: 1px solid black; border-bottom: 1px solid black; padding: 5px 0;"> Problems and Description Work Order Status & Assignment Current Work Tickets </div>									
Nature of Problem YELLOW LIGHT ON PANEL (TROUBLE)			Priority Schedule ASAP						
On MXL, What is Displayed on Panel			Desired Response Scheduled						
On Other System, Customer Description			Desired Day and Time Thursday		08:00 AM				
Yellow control panel light blinking. Please check			Caller Email demo@xlntinc.com						

- P.2 Dispatch Calendar

Allows managers and supervisors to view technician schedules by day with what tickets have been scheduled and dispatched, as well as system events where the resource is required.

Dispatch Calendar [CUSTOM]

Technician: **DF-2 - David Fisker** Filter Start: **12/24/2009** Filter End: **12/28/2009**

Display Calend...

Tech Calendar

December 2009

S	M	T	W	R	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Appointments

Meetings

Training

On Call

Called to Office / In the ...

Reminders

Alarms

Memos

Phone Calls

Tasks

Not Available

December 24, 2009 - December 28, 2009

	Fri December 25	Sat December 26	Sun December 27	Mon December 28
5:00 AM				
6:00 AM				
7:00 AM				
8:00 AM	Alltech Main Office			
9:00 AM				
10:00 AM				
11:00 AM				
12:00 PM				
1:00 PM				
2:00 PM				
3:00 PM				
4:00 PM				
5:00 PM				
6:00 PM				
7:00 PM				

- P.3 Labor Asset Maintenance

Issue, assign and manage assets and labor resource relationships. Assign assets to labor resources and check-in assets returned by labor resources.

The screenshot shows the 'Labor Asset Maintenance' application window. It features a tabbed interface with 'All Active Employees' selected. Below the tab is a table of employees. A 'Legends' section shows 'Current Cell : B29'. A 'Details on scroll' checkbox is present. The 'Labor Details' section shows fields for 'Code' (JD-2) and 'Name' (Selma, McFadden). Below this are tabs for 'Open Assets' and 'Closed Assets'. The 'Open Assets' tab is active, displaying a table of assets. At the bottom, there are 'Application' and 'Comments' tabs.

First Name	Last Name	Employment Status
Sebastian	Henderson	Full Time
Selah	Weinstein	Full Time
Selma	McFadden	Full Time

Legends Current Cell : B29

☐ Details on scroll Page 1 of 1

Labor Details

Code JD-2

Name Selma McFadden

Open Assets

Asset	Asset Name	Asset Group	Asset Sub Group	Asset Mfg Name	Asset Mfg Item Code
PEARL8130_01	Blackberry Pearl Model 8130	Cellular Phones	Blackberry Smart...	BLACKBERRY	65430
EXPLORER04	2007 Explorer #4	Vehicles	Sport Utility Vehic...	Ford	00335577
LAPTOP-DELLD500	Dell Latitude D500 Laptop Computer	Information Techn...	Laptop Computers	Dell	456456

Application Comments

- P.4 Planned Work Ticket

Create, update and manage work requirements via the work ticket applications. Time and material tickets, automated and manual maintenance tickets, as well as New Installation planned work tickets are all included.

Planned Work Ticket				
All Work Orders				
Code	Site Name	Service Co. Name	Bill Type	Status
215184	Bogart & Bacall Main Office	Bogart & Bachall Realty	Non Contract Rates	Completed
215184-1	Bogart & Bacall Main Office	Bogart & Bachall Realty	Non Contract Rates	Completed
215184-2	Bogart & Bacall Main Office	Bogart & Bachall Realty	Non Contract Rates	Completed

Legends: Current Cell: B1

☐ Details on scroll

Order Header				
Work Order #	215184	Order Date	12/16/2009	
Order Type	Time and Material - Work Ticket	Equipment	BBR-SITE-1279-EQUIP-1	Srvc Cont # 1004-SC2010
		Job #		

Service Address		Billing Information		Order Information	
Site Code	BBR-MAIN-SITE1279	Customer	BBR	Last Edit By	TREX
Site Name	Bogart & Bacall Main Office	Contact Name		Service Co.	Bogart & Bachall Realty
Cross Street	Victory Blvd	Mr.	Sam Antonio	Call Taken By	Sebastian
Address	150 Richland Avenue	Address	150 Richland Avenue	PO #	PO#876812
City	Staten Island	City	Staten Island	Placed By	Mr. Bogart
County	Richmond	County	Richmond	Area	Phone # Ext
State	New York	State	New York	Phone #	717 555-1212 12
Zip	10314	Zip	10305		

FIELD SUMMARY REPORT					
Date and Time Scheduled	12/17/2009 08:30 AM	End Date and Time	12/17/2009 02:30 PM	Cust Confirm	<input type="checkbox"/>
Call Authorized By	Mr. Bogart	Tech Confirm	<input checked="" type="checkbox"/>	Is Printed	<input type="checkbox"/>
Transportation	Bus	Dispatch	<input checked="" type="checkbox"/>	Status	Completed
Bill Status	Non Contract Rates				
Send Schedule Notification	<input type="checkbox"/>	Notify Techs	<input type="checkbox"/>	Total Tech Time (in Hours)	12
Schedule Notifications Sent	0	Tech Notifications Sent	1	Total Work Remaining (in Hours)	30

Technicians		Technician Times (BT-2 - Serefina Rodriguez)			
Technician Code	Hours	Planned Date	Plan Daily Start Time / ...	Plan Arrive Job Time	Plan Depart Job Time
BT-2 - Serefina Rodriguez	6	12/17/2009	8:00 AM	8:30 AM	2:30 PM
ER-2 - Sean Whitman	6				

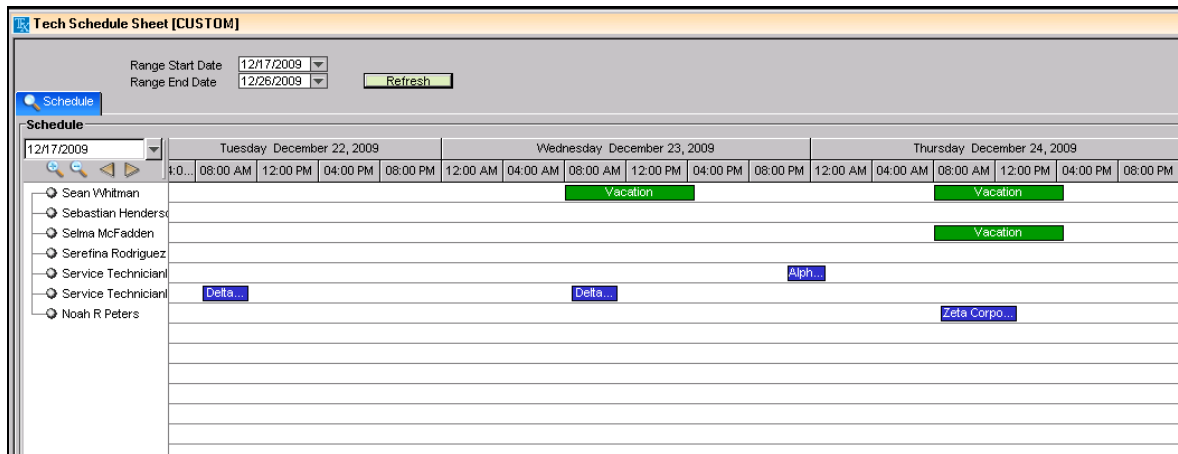
Contacts				
See At Job Site	<input checked="" type="checkbox"/> Mr.	<input checked="" type="checkbox"/> Frans	<input type="checkbox"/> Kafka	
Area	Phone #	Ext	Copy Site Contact on	
718	985-6800	101	Scheduled Notification	<input type="checkbox"/>
Equipment Contact	Mr.	John	<input type="checkbox"/> Doe	
Area	Phone #	Ext		
111	111-1111	101		

Special Conditions				

Service Details				
Line #	Service	Description	Planned Qty	Planned Time
4	CDS	Conventional Detector Sensitivity	0	6Hours
3	CHFLA	Change Fusible Links (Annually)	0	6Hours
2	CL	Check Labeling	0	12Hours

- P.5 Tech Schedule Sheet

Create and review Technician assignments for calls on this graphical scheduling board. Easily identify vacations, conflicts and resolve conflicts in scheduled work, in addition to being able to open tickets on the application and make changes where needed. All abilities to revise tickets are contingent upon security being assigned for that function.



Service Management

- Q.1 Device Service Details

Setup and maintain device types, and their service and attribute requirements. Add tests or services required to service and inspect, install new as part of a job, or on a time and material repair. This will ensure the ability to standardize the services for all components covered by your firm.

Device Service Details

QueryFor-51146

Code	Name	Filter
10CO2	10 Lb. CO 2 Extinguisher	Portable/Fire Extinguishers
50CO2	50 Lb. Wheeled Extinguisher	Portable/Fire Extinguishers
AAD	Audio Alarm Device	Fire Alarm Systems
AC	Argonite Cylinders	Fire Suppression Systems

[Legends](#) Current Cell:

☐ Details on scroll

Device Details

Code AISD
Group Fire Alarm Systems
Name Addressable Ion Smoke Detector

Default Inspection Frequency Annual

IsAHJPrintable ☐

Default Inspection Time in Minutes 10

Equipment Line Expansion Yes

Default Inspection Fees \$0.00

NFPA Code 72

Device Attributes

Device Services

Service	Default Time	Time UOM	Usage	Is Required
VIN - Visual Inspection		2Minute	Maintenance - Work Ticket	<input checked="" type="checkbox"/>
DC - Detector Cleaning		3Minute	Maintenance - Work Ticket	<input checked="" type="checkbox"/>
DEL - Deliver		5Minute	Time and Material - Work ...	<input checked="" type="checkbox"/>
ADS - Addressable Detector S...		2Minute	Maintenance - Work Ticket	<input checked="" type="checkbox"/>
TARN - Test Alarm Response ...		3Minute	New Install - Work Ticket	<input checked="" type="checkbox"/>
DEL - Deliver		5Minute	New Install - Work Ticket	<input checked="" type="checkbox"/>
DEL - Deliver		5Minute	New Install - Work Ticket	<input type="checkbox"/>
DPROG - Device Programming		5Minute	New Install - Work Ticket	<input checked="" type="checkbox"/>
DPROG - Device Programming		5Minute	Time and Material - Work ...	<input checked="" type="checkbox"/>
NINT - New Install Inspection & ...		5Minute	New Install - Work Ticket	<input checked="" type="checkbox"/>
NINT - New Install Inspection & ...		5Minute	Time and Material - Work ...	<input checked="" type="checkbox"/>

Device Service Details

QueryFor-51146

Code	Name	Filter
ADSD	Addressable Photoelectric Duct Detector	Fire Alarm Systems
AIDD	Addressable Ionization Duct Detector	Fire Alarm Systems
AISD	Addressable Ion Smoke Detector	Fire Alarm Systems
AMM	Addressable Monitor Module	Fire Alarm Systems

[Legends](#) Current Cell: B9

☐ Details on scroll

Device Details

Code **AISD** Group **Fire Alarm Systems** Name **Addressable Ion Smoke Detector**

Default Inspection Frequency **Annual** IsAHJPrintable ☐

Default Inspection Time in Minutes **10** Equipment Line Expansion **Yes**

Default Inspection Fees **\$0.00**

NFPA Code **72**

Device Attributes **Device Services**

Name	Data Type	Format Mask	Label	Default Value
SENSITIVITY - Sensitivity	Numeric	#####	Sensitivity	
ALARMTEST - Test For Alarm	YesNo	^	Test For Alarm	
TESTSUPERVISION - Test Supervision	YesNo	^	Test Supervision	

- Q.2 Inspection Frequency Matrix

Create and maintain the associations between Product Types and Authorities Having Jurisdiction, based upon System Class and Inspection Frequency by Device Type

Inspection Frequency Matrix

QueryFor-51180

Product Type	Classification	Device Type	AHJ Code
Emergency Lighting Systems	Pre-Action Sprinkler System		Joint Commision
Emergency Lighting Systems	Pre-Action Sprinkler System		New York City Fire Department
Emergency Lighting Systems	Wet Sprinkler System		Joint Commision

[Legends](#) Current Cell : D4

☐ Details on scroll

Inspection Matrix

Product Type:

Classification:

Device Type:

AHJ Code:

Inspection Frequency:

- Q.3 Service Attributes Maintenance

Define the attributes for device services. Assign basic values and language required for the inspection and testing process.

Service Attributes Maintenance

Default

Name	Label	Data Type
LEAKAGE	Valve Leakage	YesNo
LINKREPLACE	Links Replaced	YesNo
LINKTEMPERATURE	Link Temperature Rating	Numeric
MANUFACTUREDDATE	Manufactured Date	Date

[Legends](#) Current Cell : B23

☐ Details on scroll

Service Attributes Header

Name: Label:

Data Type: Format Mask:

Default Value: Value UOM:

Min Value: Max Value:

Default Frequency:

Q.4 Services Maintenance

Define and maintain a record for each of the type of services offered by your company, which can then be attached to the device to assign those services.

Services Maintenance [EDIT]

QueryFor-51045

Name	Code
Air Duct Tube Cleaning	ADTC
Air Duct Velocity Testing	ADVM
Air Sampling Pipe Cleaning	ASPC
Architectural Services	AS

[Legends](#) Current Cell: B11

☐ Details on scroll

Services Header

Code: ASPC Group: Fire Alarm Systems Type: All Worktickets

Description: Air Sampling Pipe Cleaning

Status: Active Alternate Description:

Default Duration: 0 Default Unit of Measure: Hours

Financial Data **Pictures** **Documents**

Financial Data

Sales Taxable: Yes Price Class: Standard

Allow Sales Discounts: No

Purchase Taxable: No Tax Class: Taxable

Default Cost Type: 0 Detail Account Code: FAM - Fire Alarm

Live Costs		Reference Costs		Prices	
Material Cost	\$0.00	Spare	\$0.00	Cont. Straight Time	\$0.00
Spare	\$0.00	Spare	\$0.00	Cont. Over Time	\$0.00
Freight Cost	\$0.00	Spare	\$0.00	Cont. Double Time	\$0.00
Spare	\$0.00	Spare	\$0.00	Non-Cont. Straight Time	\$0.00
Spare	\$0.00	Spare	\$0.00	Non-Cont. Over Time	\$0.00
Spare	\$0.00	Spare	\$0.00	Non-Cont. Double Time	\$0.00
Spare	\$0.00	Spare	\$0.00	Spare	\$0.00
Spare	\$0.00	Spare	\$0.00	Spare	\$0.00
Spare	\$0.00	Spare	\$0.00	Spare	\$0.00
Spare	\$0.00	Spare	\$0.00	Spare	\$0.00

Primary Vendor:

Vendors

Vendor	Vendor Name	Vendor Model Number	Vendor Model Name	Last Purchase Unit Price

- Q.5 Skill Maintenance

Create, maintain and manage records for the skills and certifications needed and held by your labor force.

Skill Maintenance [EDIT]

QueryFor-51058

Code	Name
FAM-MXLCSCGM	MXL Programming
FAM-MXLIOM	MXL Trouble Shooting - Assmely
FIRE-101-SS-FIS-100	Self -Study Fire Detection & Alarm System Basics - FIS-100
IFA_MAINT	NYC Sprinkler Inspection Certification F-90

[Legends](#) Current Cell : C22

☐ Details on scroll

Skill Info

Skill Name: NYC Sprinkler Inspection Certification F-90
 Skill Code: IFA_MAINT
 Skill Type: Certification

Certification Number: Yes
 Certification Authority: NYC Fire Department
 Certification Length (Days): 365 Does Certification Expire ? Yes

Standard Skill Cost: \$40.00 Standard Skill Price: \$25.00

Skill Notes:
 CON MAINT/SUP INT/MAR/FA SYST

Files

File Data	File Name	File Description
	certificate of approval.jpg	Blank NYC COA

ubbtemp_certificate of approval15769.jpg - Picasa Photo Viewer

System Administration

- R.1 Auto Task Scheduler

Set up recurring tasks to be managed by the Auto Task Scheduler. Evaluate records, take actions based upon conditions found in records, etc.

Auto Task Scheduler

QueryFor-1005

Execution Order	Name	Code	Recurring Type
0	generateInvoices	Create Vendor Invoices	
1	scheduleHolidays	Schedule Holiday Requests	
1	completeAbsenceEvents	Complete Absence Events	
1	expireContracts	ExpireContracts	

[Legends](#) Current Cell: B1

☒ Details on scroll Page 1 of 1

Task Information

Task Code: Create Vendor Invoices Driver:

Order: 0 Function Name: generateInvoices

* Function must not accept any parameters

Schedule Details

Recurring Type: Daily

Recurring Interval: 0

Start Date: 08/08/2008 01:30 AM

End Date:

Last Execution Date: 12/30/2009 01:29 AM

Next Execution Date: 12/31/2009 01:30 AM

* Modifying Recurring Type or Start Date will reset the Next Execution Date to the Start Date

* End Date is only required if you want the recurrence to end on a specific date

Application Comments

- R.2 Group Maintenance

Create groups and assign users to groups, in order to share similar application access and security.

Group Maintenance

QueryFor-30201

Name

Absences_Employees

Absences_Management

Assets

EVERYONE

[Legends](#) Current Cell: B4

☐ Details on scroll

Group Details

Name:

Description:

Status:

Email:

Parent:

Users

Abbott Atkins

Absence Company

Ashley Ackerman

Asset Manager

David Fisker

Donna Miller

Gregg Manson

Henry Rumpert

Jonathan Starr

Leo Karsh

Michael Seaver

Group Privileges

Module	App	Add	Edit	Delete	Copy	Report	Browse	Print	Email	Fac
Accounting Administration	Aged Receivables Detail Re...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Administration	Aged Receivables Summar...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Administration	Aged Trial Balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Administration	Batch Check Writer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Administration	Credit Card Service Fee Pa...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Administration	Journal Entries	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Administration	Payment Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Administration	15974	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Department	Cash Posting Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Department	Cash Posting Report Summ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Department	Customer Credit Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting Department	Customer Credits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Department	Customer Maintenance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Department	Customer Site Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Department	Customer Statement Compl...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- R.3 User Maintenance

Create and maintain records for each **ServiceViews™** user. Assign application access and security controls for each and all employees.

User Maintenance

QueryFor-30301

First Name	Last Name	Login Code	User Code
Frances	Exendine	FRANCES	FRANCES
Henry	Rumpert	HENRY	HENRY
James	Hewing	JAMES	JAMES
Jonathan	Starr	JONATHAN	JONATHAN

[Legends](#) Current Cell : B16

☐ Details on scroll

User Details

Salutation

First Name

M.I.

Last Name

Full Name

Street

P.O. Box

Floor/Suite

City State

Zip Country

Home Phone Fax

Office Phone Extension

Email

Department

Relation Type Relation

User Security

User Code

Login Code

Password

New Password

Retype Password

Pwd. Hint Question

Pwd. Hint Answer

☐ User change password at next login

☐ Can Export Data

Member Of

[Application Privileges](#)

Module	App	Add	Edit	Delete	Copy	Report	Browse	Print	Email	Fax
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Technician Field Service

- S.1 Work Ticket Update

Application used by field technicians (also available on the web) to report daily work ticket activity and inspection results. Ticket allows for the technicians to mark out work performed, as well as work remaining to be accomplished.

WorkTicket Update																									
Order Header																									
Work Order # 215184		Work Ticket Mode		Order Date 12/16/2009																					
Type Time and Material - Work Ticket		Equipment BBR-SITE-1279-EQUIP-1		Srvc Contract # 1004-SC2010																					
Service Address																									
Site BBR-MAIN-SITE1279																									
Name Bogart & Bacall Main Office																									
Cross Street Victory Blvd																									
Address 150 Richland Avenue																									
City Staten Island																									
County Richmond																									
State New York																									
Zip 10314-																									
Billing information																									
Customer BBR																									
Contact Name																									
Mr. Sam Antonio																									
Address 150 Richland Avenue																									
City Staten Island																									
County Richmond																									
State New York																									
Zip 10305-																									
Order Information																									
Last Edit By TREX																									
Service Co. Bogart & Bachall Realt																									
Call Taken By Sebastian																									
PO # PO#876812																									
Placed By Mr. Bogart																									
Area Phone # Ext																									
Phone # 717 555-1212 12																									
FIELD SUMMARY REPORT																									
Date and Time Scheduled 12/17/2009 08:30 AM		End Date and Time 12/17/2009 02:30 PM		Cust Confirm		Is Printed		Dispatch Status																	
Call Authorized By Mr. Bogart		Tech Confirm		File Number		Transportation		Bill Status																	
						Bus		Non Contract Rates																	
Technicians																									
Technician Code																									
BT-2 - Serefina Rodriguez																									
ER-2 - Sean Whitman																									
Technician Times (BT-2 - Serefina Rodriguez)																									
Actual Date		Actual Daily Start Time / ...		Actual Arrive Job Time		Actual Depart Job Time																			
12/17/2009		8:00 AM		8:30 AM		1:30 PM		4:30 PM																	
Site Contact																									
See At Job Site		Mr. Frans Kafka																							
Area Phone # Ext		718 985-6800 101																							
Site Contact Phone																									
Equip Contact		Mr. John Doe																							
Area Phone# Ext		111 1111111 101																							
Equip Contact Phone																									
Special Conditions																									
View Time Card																									
Service Details																									
<table border="1"><thead><tr><th>Line #</th><th>Description</th><th>Plan Qty</th><th>Actual Qty</th></tr></thead><tbody><tr><td>4</td><td>Conventional Detector Sensitivity</td><td>0</td><td>1</td></tr><tr><td>3</td><td>Change Fusible Links (Anually)</td><td>0</td><td>1</td></tr><tr><td>2</td><td>Check Labeling</td><td>0</td><td>0</td></tr></tbody></table>										Line #	Description	Plan Qty	Actual Qty	4	Conventional Detector Sensitivity	0	1	3	Change Fusible Links (Anually)	0	1	2	Check Labeling	0	0
Line #	Description	Plan Qty	Actual Qty																						
4	Conventional Detector Sensitivity	0	1																						
3	Change Fusible Links (Anually)	0	1																						
2	Check Labeling	0	0																						
Work Details																									
Service Performed Notes																									
Perform above services and tests, give Mr. Kafka and Mr. Bogart estimate for future maintenance and testing costs.																									
Work Remaining																									
Is Work Finished No																									
Work Remaining Notes																									
Work still needs to be done, many labels are out-of-date and need to check labeling throughout the system.																									

Universal Applications

- T.1 Absence Request

Application provided to allow employees to initiate absence requests.

Absence Request

Application

Labor Information

Employee Code: **JD-2** Employee Name: First Name: **Selma** M.I.: Last Name: **McFadden**

Manager Code: **RM-2** Manager Name: First Name: **Serena** M.I.: Last Name: **Addison**

Absence Request Information

Dates of Absence From: **12/24/2009 08:00 AM** To: **01/01/2010 04:30 PM**

Type of Absence: **Vacation** Submit Date: **12/22/2009**

Reason for Absence: Total Days: **9** Holiday/Weekend Days: **4** Total Request Days: **5**

Vacation from Christmas Eve to New Year's because my children are off school.

Absence Availability

Event Date	Day Of Week	Availability
12/25/2009	5 - Friday	No
12/26/2009	6 - Saturday	No
12/27/2009	7 - Sunday	No
12/28/2009	1 - Monday	No
01/01/2010	5 - Friday	No

Manager Approval Information

Status: **Approved** Approval Date: **12/22/2009**

Notes: Enjoy your time with your kids!

Company Approval Information

Approved By: First Name: **James** M.I.: **R** Last Name: **Hewing** Status: **Approved**

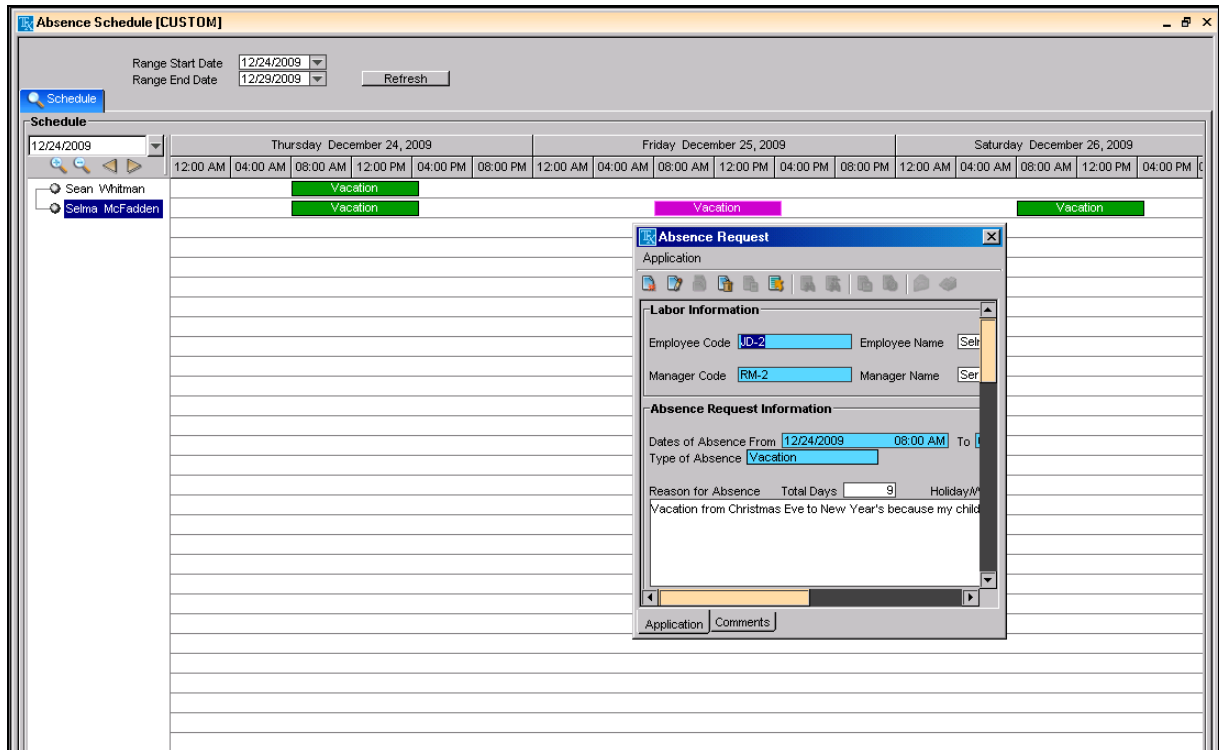
Approval Date: **12/22/2009** Paid Days In Request: **4** Unpaid Days In Request: **0**

Notes:

Application Comments

- T.2 Absence Schedule

Graphical schedule board displaying requested, approved and scheduled vacations or other absences for office workers, if so desired.



- T.3 Event Maintenance

Schedule meetings, training, customer appointments, reserve rooms and other events, including the resources to accomplish the events. Invite or demand attendee's participation at events.

Event Maintenance

Default Query

Name	Start Date
Albertson-E 33rd	12/17/2009
Alltech-Flushing	12/21/2009
Alpha Corporation Main Offices	12/23/2009
Beta Corporation Outlet Store	12/19/2009

[Legends](#) Current Cell:

☐ Details on scroll

Event Header

Event Code: Name:

Event Details

Event Type:

Event Start Date:

Event End Date:

Recurring Type:

Priority:

Status:

Show Time As:

Notify On Complete? ☐

Is Snooze Allowed? ☐

Default Snooze Duration in Minutes:

Default NotifyTime in Minutes:

Are Resources Firm? ☐

Originating Transaction Type:

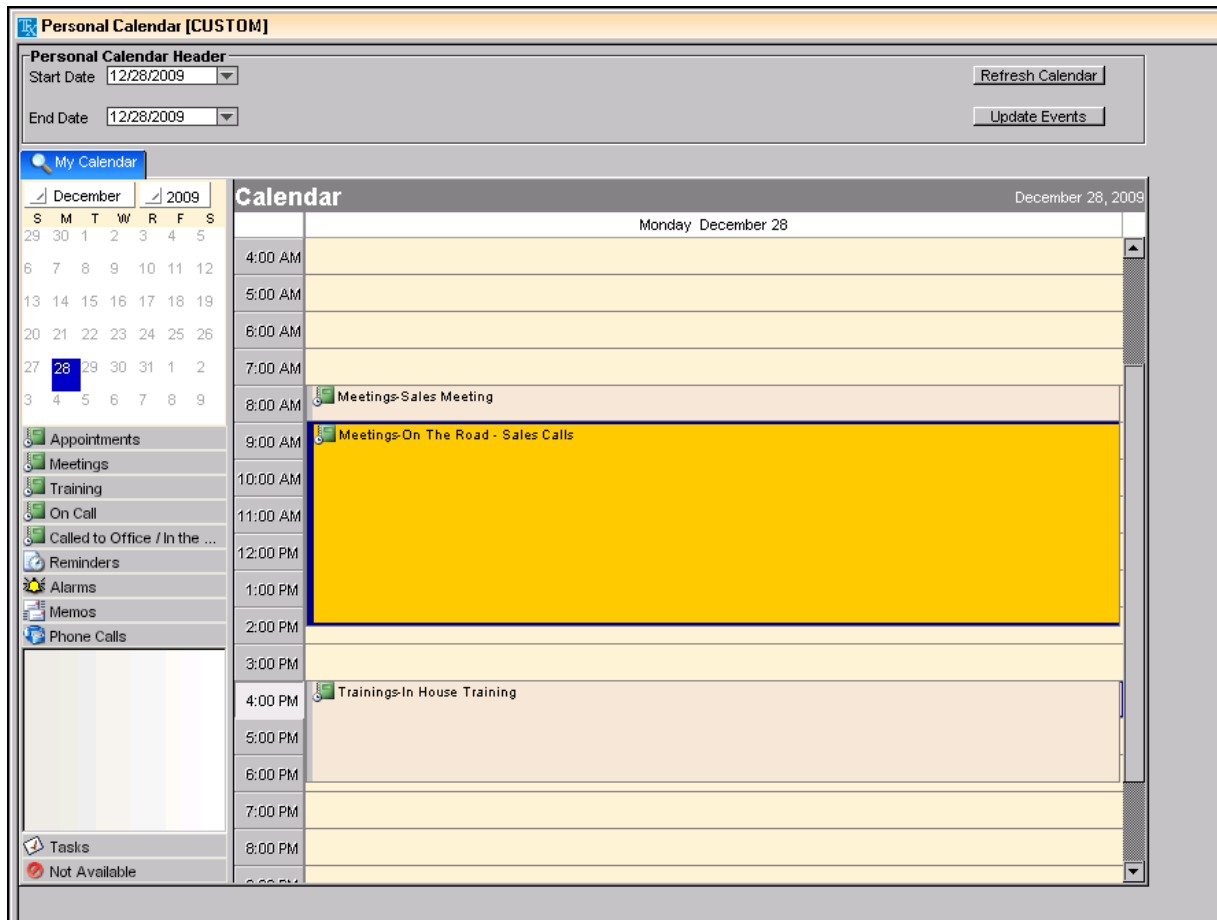
Originating Transaction:

Event Resources

Resource Type	Labor	Vendor	Customer	Resource Status	Resource Notes
Labor	LK-2			Firm	Main Conference ...

- T.4 Personal Calendar

Allows employees to view and interact with all of the events on their personal calendar. This is to be used when scheduling for vacations and other events to ensure the coordination of the events. User can manage the view, range, etc.



- T.5 Time Maintenance

Electronic time clock record application. Clock in, clock out, report time against work tickets, and other tasks.

Time Header							
Entry Date	12/28/2009		First Name	M.I.	Last Name	Clock In	Clock Out
Labor Code	LK-2		Frances		Exendine	04:21 PM	
Total Work Hours						0	
Total Job Hours						2.38	

Job Details Pictures Documents

Client Code	Activity Type	Work Ticket Code	Job Code	Start Time	End Time	Duration of Job	
AC	Non-Work Ticket Based		Training	4:22 PM	6:45 PM	2.38	Atte

Job Details Layout

Client Type	Customer	Start Time	04:22 PM
Client Code	AC	End Time	06:45 PM
Activity Type	Non-Work Ticket Based	Job Duration	2.38
Work Ticket Code		Description	Attend Training Meeting
Job Code	Training	Comments	Invited customer to join in training meeting.

- T.6 Zip Code Query

View and use zip code based information for scheduling, taxes, address validation and other purposes.

Zip Code Query [CUSTOM]

State Code: County: Zip:
Area Code: City:

ZIP Code Details

State	City	City Type	Zip Co...	Zip Code Type	County	Time Zone	Area Code
Pennsylvania	Bethlehem	USPS Default	18015	Standard	Northampton	Eastern	610
Pennsylvania	Bethlehem	USPS Default	18020	Standard	Northampton	Eastern	610
Pennsylvania	Bethlehem	USPS Default	18016	Standard	Northampton	Eastern	610
Pennsylvania	Bethlehem	USPS Default	18017	Standard	Northampton	Eastern	610




Appendix: ServiceViews™ Application Server Import Tool for Equipment Line Change

ServiceViews™ Application Server has extended capabilities to import data from Siemens fire panel configuration software like CSG-M and Zeus.

Since an individual fire panel can control thousands of devices at once, the work needed to install and maintain these panels can easily double over, as technicians need to not only program every individual device into the panel, but need to enter the same information into **ServiceViews™** for service contracts and maintenance inspections.

The Import Tool works to eliminate that redundancy by reading device information from output files generated by the panel's configuration software, and linking that data to **ServiceViews™** structures such as Item and Equipment.

For the purpose of time, this document assumes that output files were already generated for importing.

1. Begin by going to the Equipment Line Change Application and selecting the Equipment to which you want to import devices.
2. Click the Edit  icon to go into Edit Mode.

TREx-Universal Business Browser 8.1.24-b89 - [TREX@DEMO.XLNTINC.COM, Company=XLNT] - Server 8.1.24

File Application Table Customize Window Help

TREx Modules

- Accounting Administration
- Accounting Department
- Accounting Management
- Administration Department
- Administration Management
- Employment
- Engineering Administration
- Purchase Warehouse Admin
- Purchase Warehouse Depar
- Purchase Warehouse Mana
- Sales Administration
- Sales Department
- Sales Management
- Service Administration
 - Auto Work Ticket Gener
 - Equipment Line Change
 - Equipment Log Book
 - Equipment Maintenance
- Reports
- Work Remaining Approv
- Service Department
- Service Management
- System Administration
- Technician Field Service
- Universal Applications

QuickLinks
To do list
Guide

Equipment Line Change

Default

Code	Name	System Type
AC-SITE-1121-EQUIP-1	Albertson Contracting	Fire Alarm Systems
AC-SITE-200027-EQUIP-3	Albertson Contracting	Fire Alarm Systems
AC-SITE-629-EQUIP-2	Albertson Contracting	Fire Alarm Systems
AE-SITE-200085-EQUIP-1	Armada Electrical	Fire Alarm Systems

Legends Current Cell: B2

☐ Details on scroll Page 1 of 1

Equipment Master Info

Equipment Code: ZETA-SITE-1-EQUIP-1

Service Contract No: Regenerate Sequences

Customer: ZETA - Zeta Corporation

Site: ZETA-SITE-1 - Zeta Corporation Main Offices

Product Type: Fire Alarm Systems

System Classification: Interior Fire Alarm

Import Lines From CSGM / Zeus Report Files

Remove Equipment Lines Replace Equipment Lines SC Device Quantity Issue

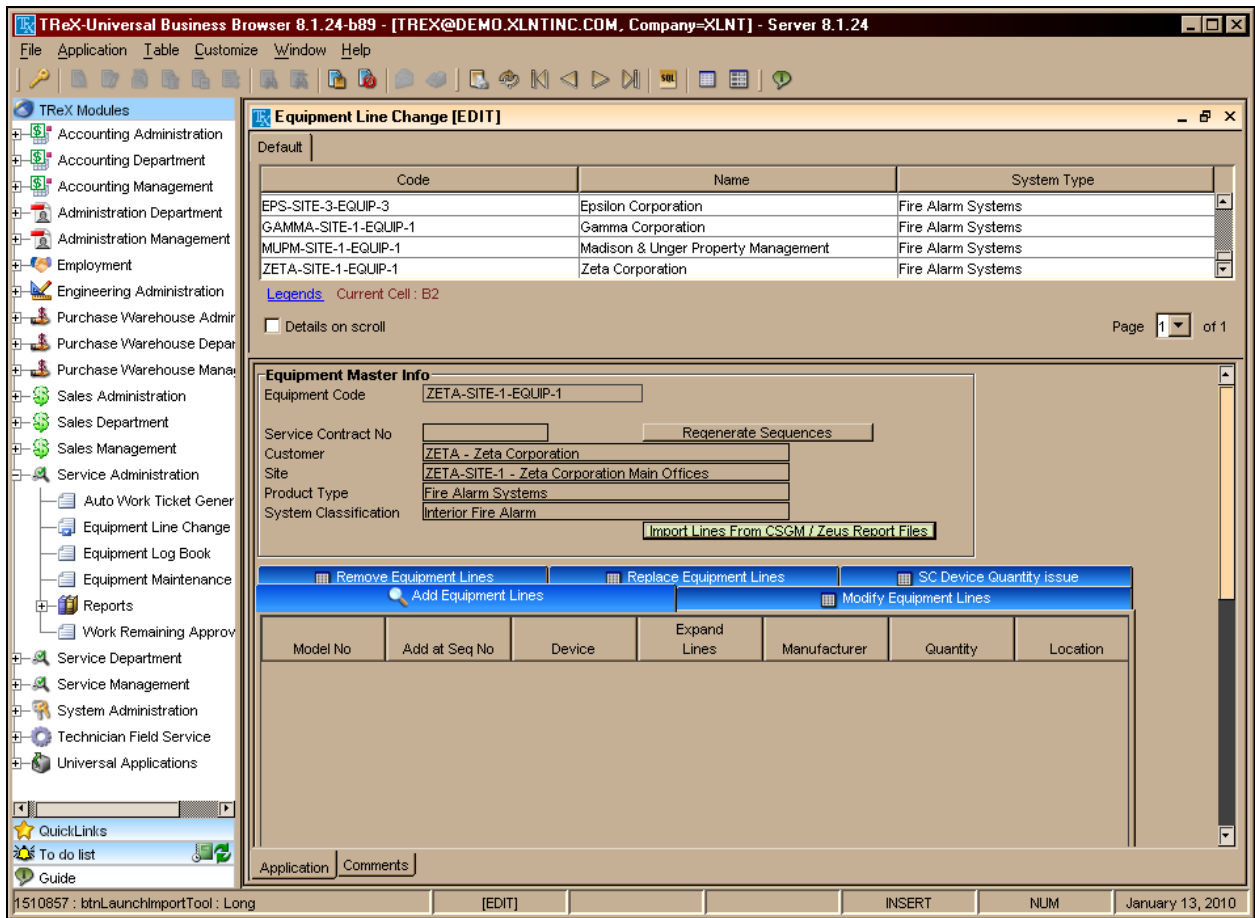
Add Equipment Lines Modify Equipment Lines

Model No	Add at Seq No	Device	Expand Lines	Manufacturer	Quantity	Location
----------	---------------	--------	--------------	--------------	----------	----------

Application Comments

[DISPLAY] INSERT NUM January 13, 2010

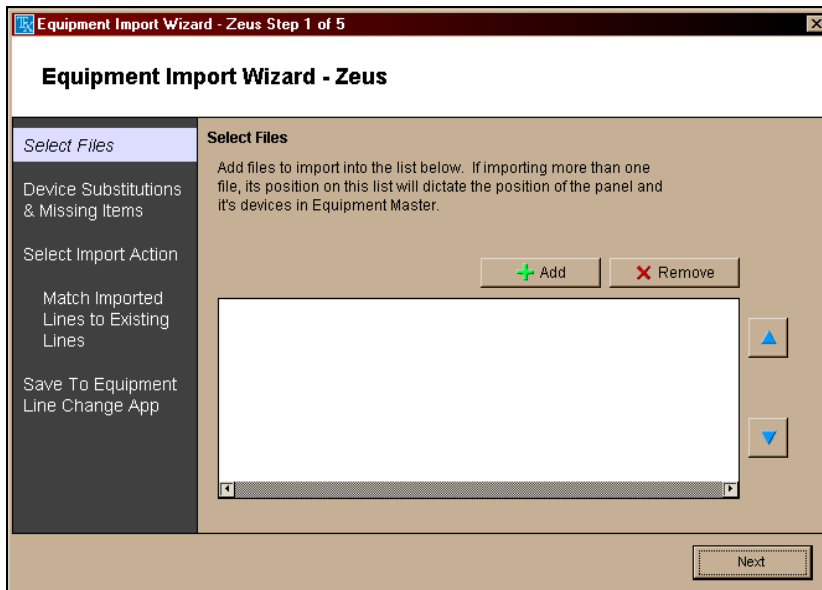
3. Click the "Import Lines From CSGM / Zeus Report Files" button.



4. Select the Import Tool to use and click Ok.



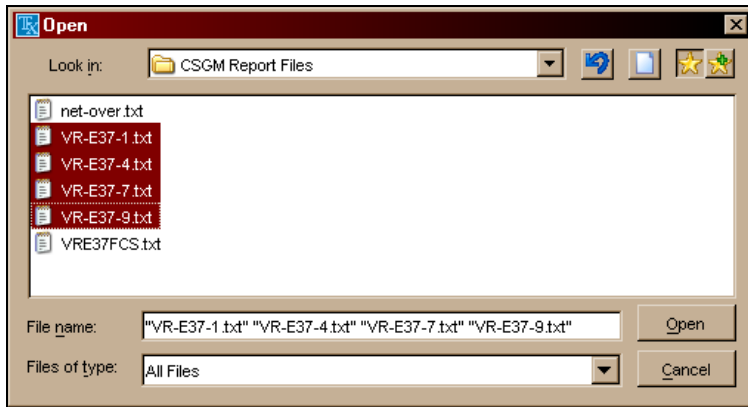
5. Click the Add button with the green plus sign to add the generated report files.



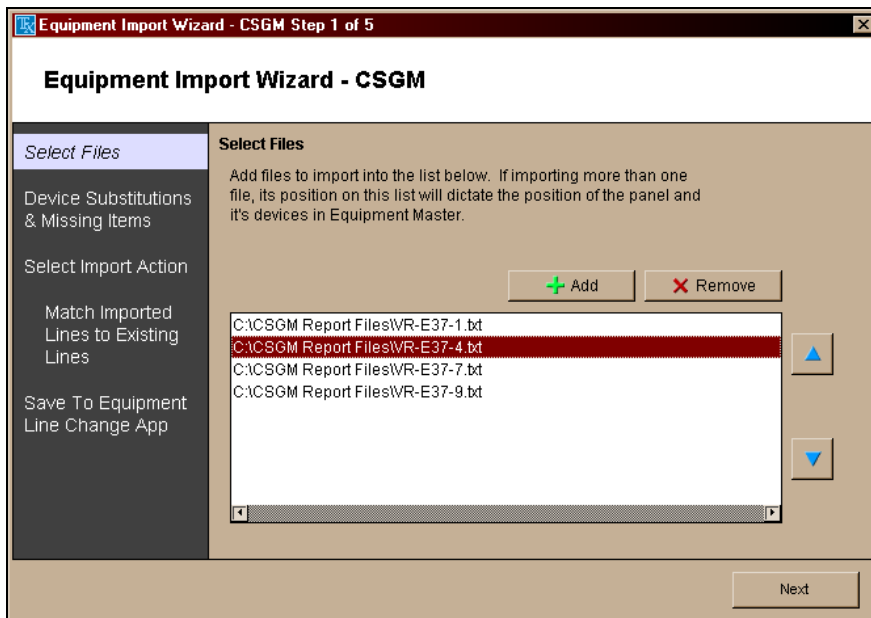
6. Click Next to continue.



Note: In a multi-panel environment, CSG-M will have one report file for each panel. The Import Tool supports this and allows for multiple report files to be selected at once.



The order of those report files will dictate the panel number. The Import Tool allows you to rearrange the files to their correct order using the blue up and down arrows.



7. Depending on the setup of the system and structures in Item Maintenance, this next screen will vary in its contents. Its main purpose is to resolve issues and discrepancies when trying to convert the details in the report file to meaningful **ServiceViews™** structures (Equipment Lines).

Equipment Import Wizard - Zeus

Device Substitutions & Missing Items

The following devices are either abstract or missing, and require substitutions in order to continue. Please select substitutions for all devices before continuing.

Report Type	Panel @ Address	Item # Equiv	Ignore	
HMS-S/D/M/SA			<input type="checkbox"/>	View Details...
NCC Node			<input type="checkbox"/>	View Details...

Item # Equiv Key: Requires a value. Value given is not in Item Master.

Back Next

One of the common issues that the user will run into when importing is unmatchable Model #'s. The above screenshot indicates that devices of type "HMS-S/D/M/SA" and "NCC Node" were encountered, yet the server cannot match those to any records in Item Maintenance. It is now up to the user to decide which Item Maintenance record those devices should link to.

To speed up this selection process (as there could be thousands of records in Item), Import Tool comes with the ability to provide a filtered list of Model #'s that can be represented by the report type "HMS-S/D/M/SA".

Equipment Import Wizard - Zeus Step 2 of 5

Equipment Import Wizard - Zeus

Select Files

Device Substitutions & Missing Items

Select Import Action

Match Imported Lines to Existing Lines

Save To Equipment Line Change App

Device Substitutions & Missing Items

The following devices are either abstract or missing, and require substitutions in order to continue. Please select substitutions for all devices before continuing.

Report Type	Panel @ Address	Item # Equiv	Ignore	
HMS-S/D/M/SA		HMS-M	<input type="checkbox"/>	View Details...
NCC Node		HMS-M	<input type="checkbox"/>	View Details...
		HMS-S		
		HMS-D		
		HMS-SA		
		<Browse...>		

Item # Equiv Key:

☐ Requires a value. ☐ Value given is not in Item Master.

Back Next

This list is defined by parser specs that are discussed with clients before the Import Tool is released to them.

Selecting "HMS-M" will then import the data inside of devices of report type "HMS-S/D/M/SA" to Equipment Lines linked to Item "HMS-M".

- If the item you want is not on the list, you can select "<Browse...>" to bring up a lookup dialog. Use it to select a valid Item record substitute.

Lookup Item Number

Enter in a search filter to narrow down the Item code list.

(Enter filter text here)

000507-043 - Power Supply, 10amp 24vdc

003X27X250X1 - Laminate For Code Cards And Risers

005295 - Galvanized Steel Nipple 2 Inch X 18 Inch

006414-003 - Remote Calibration J Box For PIRECL

006468-001 - Pointwatch Gas Callibration Kit

006824-002 - Combustable Gas Detector

007038-1 - Copper Tubing 1/4" -- Soft - 1ft Length

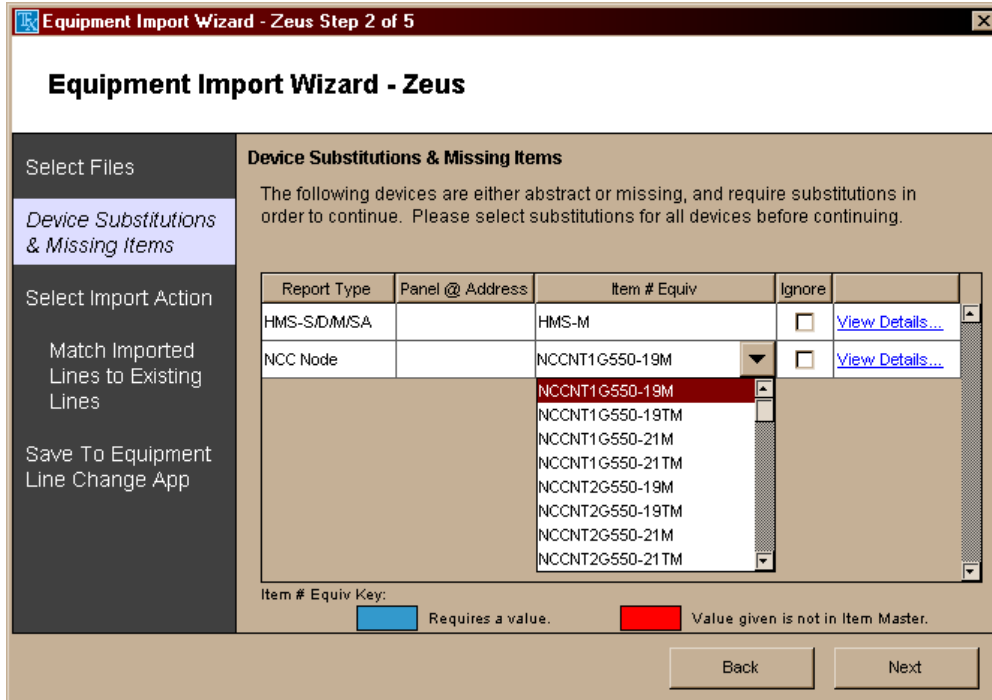
007071 - Copper Tubing 3/4" -- Hard - 20ft Length

Ok Cancel

Other parsing rules exist that will present a list of valid substitutions based on the address of a device, and some on the value of reported device attributes. The Import Tool is versatile in its abilities to comb through the CSG-M and Zeus configuration data and pull out just the information you want to maintain.

If you wish to include the Import Tool in your **ServiceViews™** Server installation, further discussion will need to take place to determine what information is available from the report and what can be done with it.

Fill in another substitution for the "NCC Node".



Equipment Import Wizard - Zeus

Device Substitutions & Missing Items

The following devices are either abstract or missing, and require substitutions in order to continue. Please select substitutions for all devices before continuing.

Report Type	Panel @ Address	Item # Equiv	Ignore	
HMS-S/D/M/SA		HMS-M	<input type="checkbox"/>	View Details...
NCC Node		NCCNT1G550-19M	<input type="checkbox"/>	View Details...
		NCCNT1G550-19M		
		NCCNT1G550-19TM		
		NCCNT1G550-21M		
		NCCNT1G550-21TM		
		NCCNT2G550-19M		
		NCCNT2G550-19TM		
		NCCNT2G550-21M		
		NCCNT2G550-21TM		

Item # Equiv Key:

☐ Requires a value. ☐ Value given is not in Item Master.

Back Next

Once all substitutions are resolved, click Next.

9. Select the Import action you wish to take.

Equipment Import Wizard - Zeus Step 3 of 5

Equipment Import Wizard - Zeus

Select Files

Device Substitutions & Missing Items

Select Import Action

Match Imported Lines to Existing Lines

Save To Equipment Line Change App

Select Import Action

☐ Replace Existing Lines
All existing Equipment lines will be set to "Inactive", and the imported lines will be added to the Equipment and set to "Active".

☐ Match Imported Lines To Existing Lines
The program will attempt to match generated lines with existing lines, using network address and device type. You will be able to manually adjust the matchings on the next screen.

Equipment Record

ZETA-SITE-1-EQUIP-1 - Zeta Corporation

Back Next

The Import Tool has the ability to match the Equipment Lines you're importing to Equipment Lines that already exists in the Equipment. If a fire panel has been upgraded/expanded, or devices have been added/removed, that information will need to be added/removed from Equipment as well. The Line Matcher utility allows the user to define which data should be preserved, what should be overridden, and what should be thrown out.

Select "Match Imported Lines To Existing Lines" and click Next.

10. For this demo Equipment, the following appears:

Equipment Import Wizard - Zeus Step 4 of 5

Equipment Import Wizard - Zeus

Select Files

Device Substitutions & Missing Items

Select Import Action

Match Imported Lines to Existing Lines

Save To Equipment Line Change App

Match Imported Lines to Existing Lines

The Matching Engine has attempted to integrate imported Equipment lines with existing Equipment Lines by matching serial-number/network address. All unmatchable Equipment lines were then added according to Network Address. Please check its results and adjust where needed.

Unused Imported Lines

Qty	Serial #	Net Addr.	Filter	Device Name	Locations

Unused Imported Lines: 0

Imported Lines Selected: 0

Existing Lines Matched to Imported Lines

Seq #	Qty	Net Addr.	Filter	Device Name	Locations	Action	Qty	Serial #	Net Addr.	Filter	Device Name	Locations
1	1		10751	Pre-action C...								
2	1		10507-D	Conventional...								
3	1		10507-D	Conventional...								
4	1		10507-D	Conventional...								
5	1		1100	Conventional...								
6	1		1100	Conventional...								
7	1		1100	Conventional...								
8	1		1100	Conventional...								
9	1		1100	Conventional...								
10	1		1100	Conventional...								
11	1		1100	Conventional...								
12	3		101-STRB	Control Panel...								
13	3		101-SFK	Control Panel...								
14								1 1:1	1:1	DLC	Control Panel...	Dlc @ 1e
15								1 1:2	1:2	ZIC-4A	Control Panel...	Zic-4a A
16								1 1:3	1:3	WIC C	Control Panel...	Nic @ 1e

Unmatch Imported Line(s)

Replace Existing With Imported

Remove Line(s)

Legend

Existing Matched To Imported

Imported Line

Flagged For Removal

Line Requires Attention

Matcher Requiring Attention: 13

Unmatchable Existing Lines: 13

Existing Lines Selected: 1

11. If you click "Next", or if you selected "Replace Existing Lines" at "Select Import Action", you will see the following screen.

Equipment Import Wizard - Zeus Step 5 of 5

Equipment Import Wizard - Zeus

Select Files

Device Substitutions
& Missing Items

Select Import Action

Match Imported
Lines to Existing
Lines

*Save To Equipment
Line Change App*

Save To Equipment Line Change App


Clicking "Finish" will close the Importer, and fill out the Add, Modify, Remove and Replace tables in Equipment Line Change.

If you wish to make any changes (regarding Substitutions or line matches) click "Back" and make them now. After the Importer closes, you will have to re-run the Importer to make any advanced changes.

Back

Finish

12. Click Finish to return to Equipment Line Change App with the imported lines entered.

13. Click the Save  icon and the new lines will be available in Equipment Maintenance.

TRex-Universal Business Browser 8.1.24-b89 - [TREX@DEMO.XLNTINC.COM, Company=XLNT] - Server 8.1.24

File Application Table Customize Window Help

TREX Modules

- Accounting Administration
- Accounting Department
- Accounting Management
- Administration Department
- Administration Management
- Employment
- Engineering Administration
- Purchase Warehouse Admin
- Purchase Warehouse Depart
- Purchase Warehouse Mana
- Sales Administration
- Sales Department
- Sales Management
- Service Administration
 - Auto Work Ticket Gener
 - Equipment Line Change
 - Equipment Log Book
 - Equipment Maintenance
 - Reports
 - Work Remaining Approv
- Service Department
- Service Management
- System Administration
- Technician Field Service
- Universal Applications

Equipment Line Change [EDIT]

Default

Code	Name	System Type
EPS-SITE-3-EQUIP-3	Epsilon Corporation	Fire Alarm Systems
GAMMA-SITE-1-EQUIP-1	Gamma Corporation	Fire Alarm Systems
MUPM-SITE-1-EQUIP-1	Madison & Unger Property Management	Fire Alarm Systems
ZETA-SITE-1-EQUIP-1	Zeta Corporation	Fire Alarm Systems

Legends Current Cell : B2

☐ Details on scroll Page 1 of 1

Equipment Master Info

Equipment Code ZETA-SITE-1-EQUIP-1

Service Contract No Regenerate Sequences

Customer ZETA - Zeta Corporation

Site ZETA-SITE-1 - Zeta Corporation Main Offices

Product Type Fire Alarm Systems

System Classification Interior Fire Alarm

Import Lines From CSGM / Zeus Report Files

Remove Equipment Lines Replace Equipment Lines SC Device Quantity issue

Add Equipment Lines Modify Equipment Lines

Model No	Add at Seq No	Device	Expand Lines	Manufacturer	Quantity	Location
DLC	14	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Dlc @ 1st Fl Ac
ZIC-4A	15	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Zic-4a Audible
NIC-C	16	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Nic @ Address
SSD	17	GACP - Annuncia...	<input checked="" type="checkbox"/>	Siemens	1	Electric Closet
PSC-12	18	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Dgp Main Pwr S
PSX-12	19	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Dgp Aux Pwr S
OCM-16	20	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Bms Outputs
SSD	21	GACP - Annuncia...	<input checked="" type="checkbox"/>	Siemens	1	Building Facilit
ZIC-8B	22	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Zic-8a @ Addr
ZIC-8B	23	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Zic-8a @ Addr
ZIC-8B	24	CPSC - Control Pa...	<input checked="" type="checkbox"/>	Siemens	1	Zic-8b Future I

Application Comments

1510857 : btnLaunchImportTool : Long [EDIT] INSERT NUM January 13, 2010