

Equipment Maintenance - Parts and Supplies Setup

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Pathway: Setup > Operations > Equipment Maintenance > Parts and Supplies

The **Equipment Maintenance Parts Setup** screen is used to record the inventory of parts required for maintenance and repair activities on a truck. The screen consists of two separate grids: one for entering the part details in the upper section and another for inputting the cost of the part in the lower section.

EQUIPMENT MAINTENANCE PARTS SETUP					SETUP > OPERATIONS > EQUIPMENT MAINTENANCE > PARTS AND SUPPLIES				
+					↻				
ID	NAME	EQUIPMENT SYSTEM	DESCRIPTION	ACTIVE					
1000	Battery and Charging System			Yes					
1001	Brakes and Steering			Yes					
1002	Tires			Yes					
1003	Synthetic Oil			Yes					
1004	Oil Filter			Yes					
1005	Cabin Filter			Yes					
1006	Engine Filter			Yes					
1007	Wheel Well			Yes					
Cost									
+									
ID	EFFECTIVE DATE	QUANTITY	COST PER UNIT	NOTE					
1001	06/23/2023	6.00	450.00						

Field Descriptions

Parts (Upper Grid)	
ID	The ID that the system assigns to the equipment part upon save.
Name	The name of the equipment part that displays for selection when a maintenance plan is created.
Equipment System	Identifies the system or functional area of the equipment that the part is associated with.
Description	Option to add a description to better identify the equipment part with.
Active	Controls the availability of the equipment part for selection when adding it to a maintenance plan. Defaults to 'Yes.'
Cost (Lower Grid) Cost is based on the Equipment selected.	
ID	The ID that the system assigns to the cost upon save.
Effective Date	Date to track when a cost was effective.
Quantity	Identifies the required quantity of parts or equipment when performing maintenance.
Cost Per Unit	Indicates the unit cost of the equipment part required when performing maintenance.

Note

Option to add a note such as special pricing for bulk purchases.

Add and Edit Equipment Maintenance Parts

By default, parts and supplies are active and only require a Name. When selecting a part to add to a maintenance order, only the Name is displayed.

ID	NAME	EQUIPMENT SYSTEM	DESCRIPTION	ACTIVE
1000	Battery and Charging System			Yes
1001	Brakes and Steering			Yes
1002	Tires			Yes
1003	Synthetic Oil			
1004	Oil Filter			
1005	Cabin Filter			
1006	Engine Filter			
1007	Wheel Well			

ID	EFFECTIVE DATE
1001	06/23/2023

Add

1. Select the **Add** icon from the upper grid.
2. Enter a **Name** for the Equipment Part.
3. Select the **Equipment System** if one applies.
4. Enter a **Description** (optional).
5. Verify the **Active** drop down is set to **Yes** to make the equipment part available for use.
6. Click **Save** when finished.
7. Add **Cost**:
 - Select an equipment part from the grid above.
 - Click the **Add** icon from the **Cost** section.
 - Enter an **Effective Date**.
 - Enter the **Quantity**, or number of parts needed when maintenance is performed.
 - Enter the expected **Cost Per Unit**.
 - Add a **Note** (optional) that will display in the maintenance plan for the cost of the parts.
 - Click **Save** when finished.

Edit

This process also applies to edit Costs.

1. From the setup screen, double-click the row of the part you would like to edit to display the **Update Equipment Maintenance Parts** popup editor.
2. Apply your changes and click **Save**.

Apply Parts & Supplies to a Equipment Maintenance Order

Attach Parts and Supplies to a maintenance order from the Parts & Supplies tab.

The screenshot displays the 'EDIT EQUIPMENT MAINTENANCE ORDER - 1026' interface. The main window has a blue header and a navigation bar with tabs: 'Detail', 'Labor', 'Parts & Supplies' (highlighted with a red box), 'Attachments', and 'Photos'. The main content area shows fields for 'TRUCK' (151), 'MAINTENANCE PLAN' (Unscheduled), 'STATUS' (Open), and 'TARGET DATE' (12/31/2025). A 'Current Equipment Details' box contains 'Plate: GNV3838', 'Odometer: 36,099.00 miles', and 'Engine Hours: 157.00'. A modal window titled 'ADD EQUIPMENT MAINTENANCE ORDER PARTS' is open, showing fields for 'EQUIPMENT SYSTEM', 'PART / SUPPLY', and 'QUANTITY', along with a 'NOTE' text area and a 'SAVE' button.

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