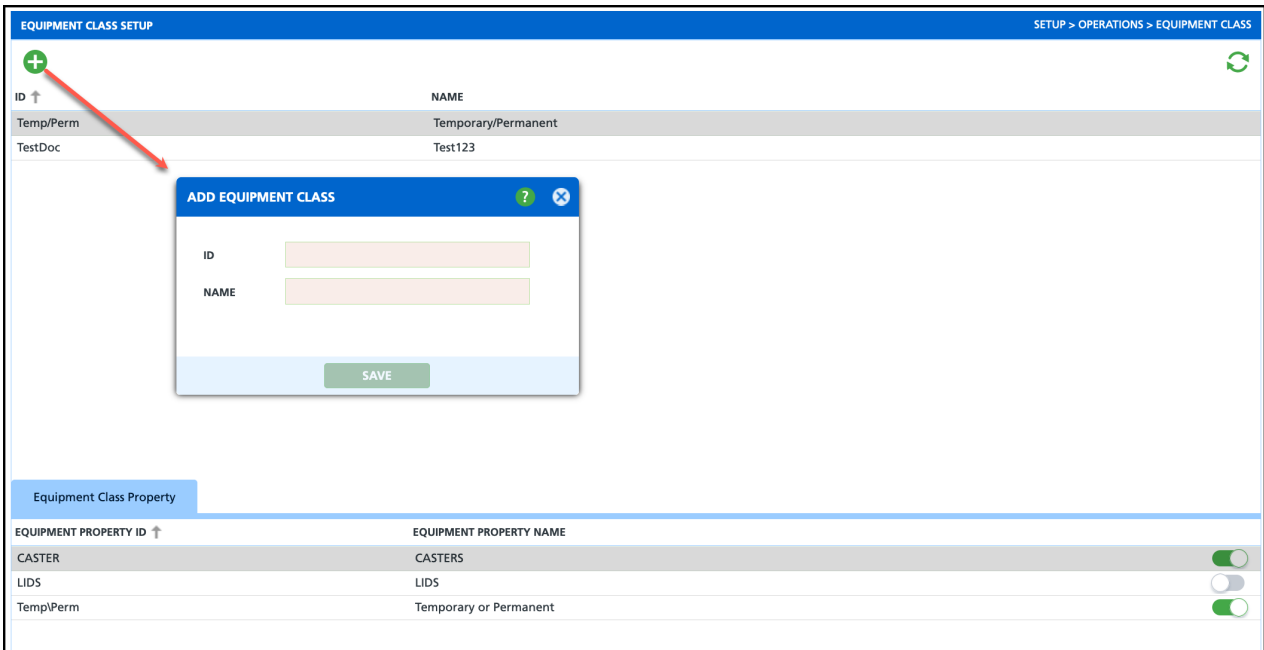


Equipment Class Setup

Last Modified on 03/11/2024 2:53 pm EDT

Pathway: Setup > Operations > Equipment Class

The Equipment Class Setup tool categorizes equipment type properties, such as wheel type, lid, etc., by class. This classification allows it to be linked to an equipment type and recorded when the equipment is used for a service.



Permissions

The following permissions are required to view, add and edit the Equipment Class Setup screen:

Permission ID	Permission Name
24	Setup \ Operations

Field Descriptions

Field	Description
ID	The identifier title for the equipment class.
Name	The full name of the equipment class.

Add a New Equipment Class

1. Click the **green +** icon from the Equipment Class Setup screen and the 'Add Equipment Class' popup will display.
2. Complete the following required fields in Add New Equipment Class:
 - Enter an **ID**
 - Enter a **Name**
3. Click **Save** when finished. Once saved, 'Equipment Class Property' can be added.

Equipment Class Property

The Equipment Class Property (tab) defines the specific equipment items included in the class and determines

what will be displayed for selection when adding a service to a site. To add equipment class property, first select an equipment class from the upper grid. Then, add equipment using the toggle buttons.

Assign the Equipment Class to an Equipment Type

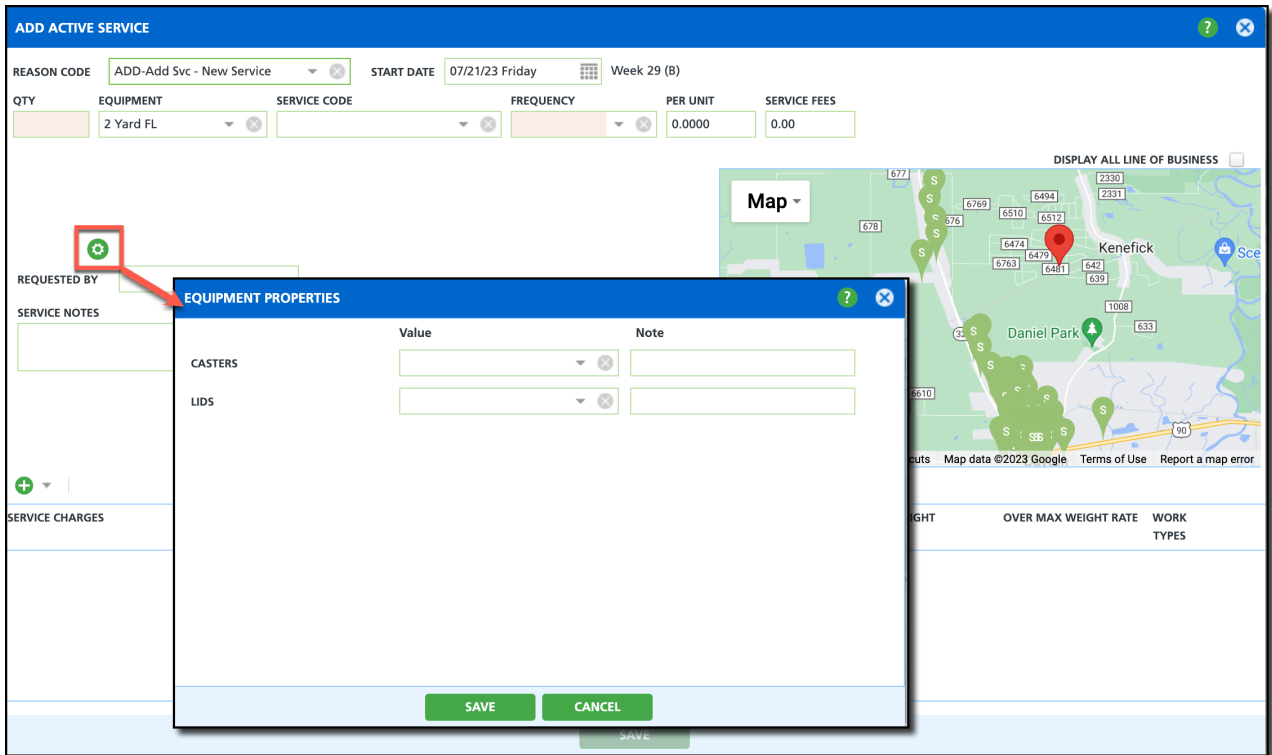
Pathway: Setup > Services > Equipment Type

Once the Equipment Class has been created, it must be assigned to an Equipment Type. This allows the equipment properties assigned to the class to be available for selection when adding a service to a site.

Connecting Equipment to Active Services

Pathway: Open the Site > Add Active Service

When adding an active service that involves equipment with property options, a green gear icon displays above the 'Requested By' field. By clicking on the icon, you can specify the properties for the particular piece of equipment used by the service. Once properties are added, they will be displayed with the active service and on the work order.



Work Order Example with Equipment Properties

EDIT SERVICE RECORD

ENYA & COMPANY
777 HOLLYWOOD LANE 3636
DAYTON, TX 77535

CREATED BY
Isabel Nancy on 7/19/23 8:06 am

ORDER REASON

ACCESS (2217 BOWIE LOOP) TRAILER

WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL
6396529	1	2 Yard Recycle Service	2YD	FL_EXTRAPU	On Call	REC

Metal Lids, SWIVEL WHEELS

ORDER NOTES

PO NUMBER

EXTERNAL ID

EQUIPMENT PROPERTIES

	Value	Note
CASTERS	SWIVEL WHEELS	
LIDS	Metal Lids	

SAVE CANCEL

Charges Payments Comp

Charges must match Equipment
 Charges must match Material

GROSS QTY	LABELS	NO CHARGE QTY	CHA

Select Print Format

SAVE