

A large, light blue chevron graphic pointing upwards, centered on the page. It is composed of two overlapping triangles, one pointing up and one pointing down, creating a central white space.

Service Delivery

Equipment Monitoring Toolkit

USER GUIDE

Updated June 12, 2019

UPTAKE

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DISCLAIMER

We update EMT frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

TRADEMARKS

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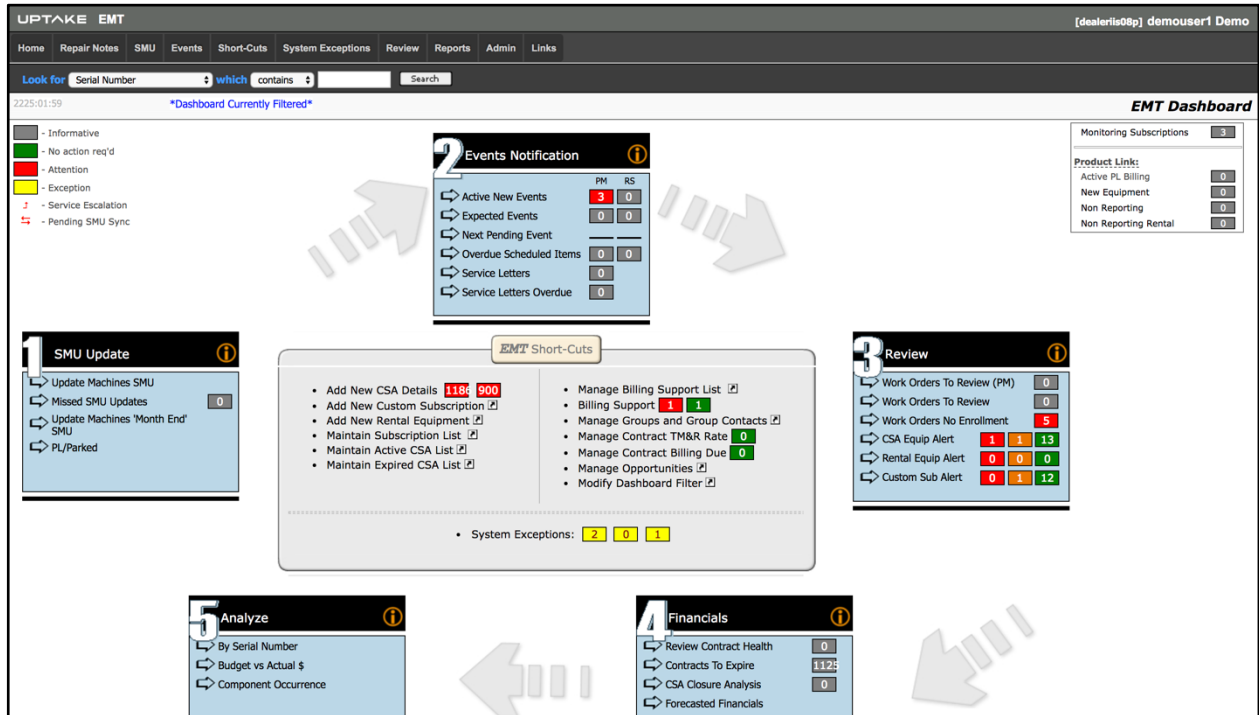
CUSTOMIZATION

This user guide will show you how to use the EMT application with the assumption that your dealership has made the migration to CloudLink and your EMT application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

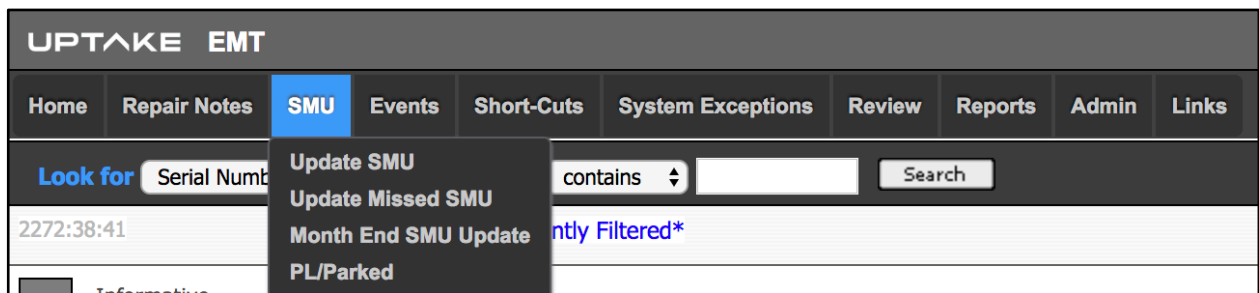
NOTE: EMT currently only supports the Google Chrome™ browser.

INTRODUCTION

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **EMT**. You will be taken to the Equipment Monitoring Toolkit Home page.



Navigation Bar



Hover your cursor over the drop-down menus in the top navigation bar to access the different areas within EMT.

Search







Search for specific information within EMT using the search bar at the top of the screen. Refine your search using the drop-down menus and text field, then click **[Search]**.

DASHBOARD

The EMT Dashboard is a collection of useful links and information and is arranged based on a recommended workflow.

Legend

The smaller information boxes in the Dashboard are color-coded based on the following legend:

	- Informative
	- No action req'd
	- Attention
	- Exception
	- Service Escalation
	- Pending SMU Sync

- **Informative**
- **No action req'd**
- **Attention**
- **Exception**
- **Service Escalation:** Displays in the Event or priority of Active new event.
- **Pending SMU Sync:** Displays in machine service tab in PM Code column, waiting to sync with Service Scheduler and Work orders (when closed).

Monitoring Subscriptions

The Monitoring Subscriptions box reports the number of machines that have Product Link installed.

Monitoring Subscriptions	3
Product Link:	
Active PL Billing	0
New Equipment	0
Non Reporting	0
Non Reporting Rental	0

- **Monitoring Subscriptions:** Equipment being monitored in EMT.
- **Active PL Billing:** Active Product Link devices.
- **New Equipment:** Product Link reporting readings but no rental contract.
- **Non-Reporting:** Product Link units that have not reported in a period of time, normally 7 days.
- **Non-Reporting Rental:** Product Link rental units that have not reported in a period of time, normally 7 days.

EMT Short-Cuts

The screenshot shows a dashboard titled "EMT Short-Cuts" with two columns of menu items. The left column includes: "Add New CSA Details" (1186, 900), "Add New Custom Subscription" (with a map icon), "Add New Rental Equipment" (with a map icon), "Maintain Subscription List" (with a map icon), "Maintain Active CSA List" (with a map icon), and "Maintain Expired CSA List" (with a map icon). The right column includes: "Manage Billing Support List" (with a map icon), "Billing Support" (1, 1), "Manage Groups and Group Contacts" (with a map icon), "Manage Contract TM&R Rate" (0), "Manage Contract Billing Due" (0), "Manage Opportunities" (with a map icon), and "Modify Dashboard Filter" (with a map icon). Below a dashed line, there is a "System Exceptions" section with counts: 2, 0, and 1.

Add New CSA Details

A list of serial numbers that have a CSA contract but are not set up in EMT. You have the option of setting up the serial number in EMT or deleting the equipment. As new contracts are added in DBS they are loaded into EMT overnight.

Add New Custom Subscription

This section allows you to add a machine to EMT without a CSA contract. You can also set up a serial number before the contract has been created, allowing EMT to begin monitoring.

NOTE: The equipment must already be in the dealer's equipment population.

Add New Rental Equipment

This list is the same as **Custom Subscription**, but the Machine type will default to Rental Fleet.

Maintain Subscription List

If you need to edit the CSC contract subscription, this will display a list with edit or delete options for all machines. A map link is also provided for equipment that is enabled with Product Link. The pop-up window will display the machine on a map along with any other equipment that is close by.

Clicking **[Edit]** will display the Machine Information page where you can edit the information.

Clicking **[Delete]** will change the equipment status to Deleted. The system will ask for confirmation before deleting. You can undelete a serial number by hovering over the Admin menu and clicking on **Manage Deleted Equipment**.

Maintain Active CSA List

This list displays all equipment with an active CSA contract even if they are not being monitored by EMT. Click **[Edit]** to edit the equipment information, or click **[Delete]** to remove it from this list and into the Deleted Equipment list.

Maintain Expired CSA List

This list displays all equipment with an expired CSA contract even if they are not being monitored by EMT. Click **[Edit]** to edit the equipment information, or click **[Delete]** to remove it from this list and into the Deleted Equipment list.

Manage Billing Support List / Billing Support

The Invoice Supporting Data functionality of EMT allows a dealer to provide invoice supporting data to their customers. This does not create an invoice, but instead creates a customizable Excel sheet that can be attached to the invoice to show the customer the details that support the invoiced amount.

The invoice supporting data has two main processes:

1. Create and configure an invoice supporting template.
 - a. Create the template and attach it to a customer.
 - b. Determine the values that should be included in the supporting data.
 - c. Attach one or more machines to the template.
2. Once a billing period is completed, EMT will generate the invoice supporting data.
 - a. Based on the billing template parameters, EMT will automatically create a billing report.
 - b. EMT uses the month end SMU readings that are set in Box 1 to determine the SMU reading at the beginning and end of the period.
 - c. EMT uses the TM&R rate that is set on the Contract Information page to calculate the invoice amounts.
 - i. If there are different TM&R billing amounts during the period, EMT will use the appropriate billing amount for each of the corresponding billing periods.
 - ii. If the billing amount is a flat rate, EMT will calculate a daily rate.

Create and Configure Invoice Supporting Data:

Click on the **Manage CSA Billing List** link under Admin in the top navigation bar, or click **Manage Billing Support List** on the Dashboard.

The Manage CSA Billing List page displays a list of existing templates that have already been set up. Templates are linked to a customer and each customer can have 1 or more templates attached.

Manage CSA Billing List					
Customer Number	Customer Name	Description	Invoice Period	Status	[Add]
284059	RESEARCHER CENTER LTD	Monthly Supporting DATA	Monthly	Enabled	[Edit] [Delete]
8541450	M Sullivan & SON -MPTSD	M Sullivan	Monthly	Enabled	[Edit] [Delete]
9531675	MAURICE HOLD EQUIPMENT	Maurice	Monthly	Enabled	[Edit] [Delete]
8506560	OFFICE (MPTSD -MPTSD)	Power by the Hour Invoicing	Monthly	Enabled	[Edit] [Delete]

Show page: 1 (Total Records: 4) Records Per Page: 25

[Back](#)

From this page you can do one of the following:

- Add a new template by clicking **[Add]**.
- Edit an existing template by clicking **[Edit]**.
- Delete a template by clicking **[Delete]**.

Clicking **[Add]** or **[Edit]** displays the Edit Customer Template page.

Edit Customer Template																																																																																								
Customer Details:																																																																																								
Customer No:	<input type="text"/>	<input type="button" value="Find"/>	Customer Name:	<input type="text"/>	<input type="button" value="Find"/>																																																																																			
Description:	<input type="text"/>																																																																																							
Status:	Enabled <input type="button" value="v"/>																																																																																							
Invoice Parameter:	Invoice Period: Monthly <input type="button" value="v"/>																																																																																							
Comment:	<input type="text"/>																																																																																							
Invoice Start Date:	May 30, 2019 <input type="button" value="v"/>																																																																																							
<table border="1"> <thead> <tr> <th>Template</th> <th>Template Group</th> <th>Machine</th> </tr> </thead> <tbody> <tr> <th>Template Item</th> <th>Default Item Header</th> <th>Customer Item Header</th> <th>Item Order</th> <th>Include <input checked="" type="checkbox"/></th> </tr> <tr> <td>AccountNo</td> <td>Account #</td> <td>Account #</td> <td>1</td> <td><input type="checkbox"/></td> </tr> <tr> <td>CustomerName</td> <td>Cust Name</td> <td>Cust Name</td> <td>2</td> <td><input type="checkbox"/></td> </tr> <tr> <td>UnitNo</td> <td>Unit</td> <td>Unit</td> <td>3</td> <td><input type="checkbox"/></td> </tr> <tr> <td>SerialNo</td> <td>Serial #</td> <td>Serial #</td> <td>4</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Model</td> <td>Model</td> <td>Model</td> <td>5</td> <td><input type="checkbox"/></td> </tr> <tr> <td>StartDate</td> <td>Start Date</td> <td>Start Date</td> <td>6</td> <td><input type="checkbox"/></td> </tr> <tr> <td>EndDate</td> <td>End Date</td> <td>End Date</td> <td>7</td> <td><input type="checkbox"/></td> </tr> <tr> <td>StartSMU</td> <td>Start SMU</td> <td>Start SMU</td> <td>8</td> <td><input type="checkbox"/></td> </tr> <tr> <td>EndSMU</td> <td>End SMU</td> <td>End SMU</td> <td>9</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Region</td> <td>Region</td> <td>Region</td> <td>10</td> <td><input type="checkbox"/></td> </tr> <tr> <td>PreviousMonthendSMU</td> <td>Previous Monthend SMU</td> <td>Previous Monthend SMU</td> <td>11</td> <td><input type="checkbox"/></td> </tr> <tr> <td>MonthlyUsage</td> <td>Hours Utilized for the Month</td> <td>Hours Utilized for the Month</td> <td>12</td> <td><input type="checkbox"/></td> </tr> <tr> <td>HourlyRate</td> <td>Hourly Rate</td> <td>Hourly Rate</td> <td>13</td> <td><input type="checkbox"/></td> </tr> <tr> <td>ContractHours</td> <td>Contract Hours to Date</td> <td>Contract Hours to Date</td> <td>14</td> <td><input type="checkbox"/></td> </tr> <tr> <td>EndingUsage</td> <td>Term Hour</td> <td>Term Hour</td> <td>15</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>						Template	Template Group	Machine	Template Item	Default Item Header	Customer Item Header	Item Order	Include <input checked="" type="checkbox"/>	AccountNo	Account #	Account #	1	<input type="checkbox"/>	CustomerName	Cust Name	Cust Name	2	<input type="checkbox"/>	UnitNo	Unit	Unit	3	<input type="checkbox"/>	SerialNo	Serial #	Serial #	4	<input type="checkbox"/>	Model	Model	Model	5	<input type="checkbox"/>	StartDate	Start Date	Start Date	6	<input type="checkbox"/>	EndDate	End Date	End Date	7	<input type="checkbox"/>	StartSMU	Start SMU	Start SMU	8	<input type="checkbox"/>	EndSMU	End SMU	End SMU	9	<input type="checkbox"/>	Region	Region	Region	10	<input type="checkbox"/>	PreviousMonthendSMU	Previous Monthend SMU	Previous Monthend SMU	11	<input type="checkbox"/>	MonthlyUsage	Hours Utilized for the Month	Hours Utilized for the Month	12	<input type="checkbox"/>	HourlyRate	Hourly Rate	Hourly Rate	13	<input type="checkbox"/>	ContractHours	Contract Hours to Date	Contract Hours to Date	14	<input type="checkbox"/>	EndingUsage	Term Hour	Term Hour	15	<input type="checkbox"/>
Template	Template Group	Machine																																																																																						
Template Item	Default Item Header	Customer Item Header	Item Order	Include <input checked="" type="checkbox"/>																																																																																				
AccountNo	Account #	Account #	1	<input type="checkbox"/>																																																																																				
CustomerName	Cust Name	Cust Name	2	<input type="checkbox"/>																																																																																				
UnitNo	Unit	Unit	3	<input type="checkbox"/>																																																																																				
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EndDate	End Date	End Date	7	<input type="checkbox"/>																																																																																				
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PreviousMonthendSMU	Previous Monthend SMU	Previous Monthend SMU	11	<input type="checkbox"/>																																																																																				
MonthlyUsage	Hours Utilized for the Month	Hours Utilized for the Month	12	<input type="checkbox"/>																																																																																				
HourlyRate	Hourly Rate	Hourly Rate	13	<input type="checkbox"/>																																																																																				
ContractHours	Contract Hours to Date	Contract Hours to Date	14	<input type="checkbox"/>																																																																																				
EndingUsage	Term Hour	Term Hour	15	<input type="checkbox"/>																																																																																				

To attach the template to a customer, enter the customer number and name manually or use the **[Find]** buttons to search for the customer.

Enter a Description, Status, Invoice Parameter, and any Comments.

Template Tab:

The Template tab provides a list of the available attributes that can be displayed on the final invoice supporting document. From here you can:

- Choose the attributes to include.
 - Click in individual Include checkboxes, or click the green check mark to select or deselect all.
- Modify the column headers. Uptake provides a generic header, but you have the ability to modify them as needed.
- Modify the sort order. This determines the order in which the attributes will be displayed on the final invoice supporting Excel document.

Template Group Tab:

The Template Group tab allows you to include one or more groups within a single invoice supporting Excel document.

NOTE: Each template must contain at least one group.

Edit Customer Template

Customer Details:

Customer No: Find Customer Name: Find

Description:

Status: Enabled

Comment:

Invoice Parameter:

Invoice Period: Monthly

Invoice Start Date: May 30, 2019

TemplateName	Region	Location	Action [Add]
Update			

Click the **[Add]** button, enter a Group Name, Region, and Location, then click **[Add]** again.

Machine Tab:

The Machine tab allows you to associate one or more serial numbers to a template group.

Edit Customer Template

Customer Details:

Customer No: Find Customer Name: Find

Description:

Status: Enabled

Comment:

Invoice Parameter:

Invoice Period: Monthly

Invoice Start Date: May 30, 2019

Serial No	Model No	Unit No	Customer No	Customer Name	Template Group	Action [Edit] [Delete]
OBEWS8265	FIREPUMP	1123276	RAR CONTRACTOR LTD	test		[Edit] [Delete]
Update						

To add a new serial number to the list:

1. Click **[Add]**.
2. Search for the serial number by Serial Number or Customer Number.
3. Click the checkbox next to the serial number, then click **[Select]**.

To set the Template Group:

1. Click **[Edit]**.
2. Select the Template Group from the drop-down menu.
3. Click **[Update]**.

To delete a serial number from the Template Group:

1. Click **[Delete]**.

Generated Report:

Once the template is completed, the next step is to create an actual report. A separate report is created for each billing period based on the parameters entered in the Template Definition page.

The reports are generated automatically once one or more of the associated serial numbers have the Month End SMU set (using the Update Machines Month End SMU link on the dashboard).

Clicking the **Billing Support** link to display the list of generated reports.

Create/Review Invoice Supporting Data								
<input type="button" value="Back"/>								
Show page: 1 (Total Records: 0)								Records Per Page: 25
Customer No	Customer Name	Template Description	Billing Start Date	Billing End Date	Group Name	Invoice No	Status	Action
No Records Found!								
Show page: 1 (Total Records: 0)								Records Per Page: 25
<input type="button" value="Back"/>								

Click **[Edit]** to display the details of the generated report. Here you can enter the customer purchase order, work order, and invoice. Within each group you can click on the **[Machine Link]** button to view the machines that are linked to the group, or click **[Machine Loaner]** to enter loaner machines.

Manage Groups and Group Contacts

Groups can be associated with a particular piece of equipment for different reasons, such as issue notifications. See the **Groups and Contacts** section for more information.

Manage Contract TM&R Rate

EMT has the ability to alert you when a contract is due for a yearly rate review. When and if the contract is due for yearly rate reviews are set up in the Contract Information Page.

Contract Information		Budget	Financial Chart	Documents	
Contract Details					
Start Date	3/1/2017	End Date	3/1/2018		
Start SMU	0	End SMU	0		
Current Rate					
Current TM&R	[Click to Add]	CPI	May	1	
Rate Details					
TM&R	Starting Hour	Effective Date	Change By	Change Date	Option
Billing Period Details				Flat Rate Billing: <input type="checkbox"/>	
Billing Interval		Billing Type	Days	Start Date	End Date
PO Number	CALL FOR PO	Comments			
Inclusions / Exclusions					
<input type="button" value="Return To Working List"/> <input type="button" value="Copy Contract Details"/> <input type="button" value="Update"/>					

Once the month and day are set, EMT will alert the user on the dashboard when a contract is due for a rate review.

The Manage Contract TM&R Rate page allows you to either enter a percent increase or manually type in the exact new rate. You can also manage the new rate's valid date range.

Manage Contract TM&R Rate																
CPI Due Year: 2010 CPI Due Month: March Search																
Customer Number	Customer Name	Serial Number	Make	Model	EqNo	EnrollmentNo	Meter SMU	LTD SMU	CPI Month	CPI Day	Current Eff. Date	Current Rate	CPI Multiplier	New Rate	Eff. Date	Update
3984185	RAY TRAVIS (TE)	0MRT00527	AA	D6R III		HAM07T002	4030	4030	March	1	03/01/2009	8.77			03/01/2010	<input type="checkbox"/>
3984185	RAY TRAVIS (TE)	0AWF00379	AA	826H		HAM07T003	4164	4164	March	1	03/01/2009	14.32			03/01/2010	<input type="checkbox"/>
2924275	GENERAL INVESTORS RECYCLING	0KSK01204	AA	950H	WL8	CON07P006	3815	3815	March	1	03/01/2009	10.22			03/01/2010	<input type="checkbox"/>
7019800	IMPRESSO CONCRETE PRODUCTS	0KZN00590	AA	IT14G-00		HAM07T001	1615	1615	March	1	09/13/2007	5.95			03/01/2010	<input type="checkbox"/>
140405	THE CORPORATION OF THE CITY	0MJC00514	AA	938H	40-726	TBY09T003	778	778	March	1	02/02/2009	6.89			03/01/2010	<input type="checkbox"/>
8887535	TRU CON EXCAVATING	0DHC00262	AA	930H		LON08T004	4562	4562	March	1	03/01/2009	7.55			03/01/2010	<input type="checkbox"/>
9002725	INDUSTRIAL BOND & CRANE	0JMS04370	AA	980H		CAM09T001	2553	2553	March	1	03/01/2009	11.58			03/01/2010	<input type="checkbox"/>
Show page: 1 (Total Records: 7) Records Per Page: 25																
<input type="button" value="Back"/> <input type="button" value="Update"/> <input type="button" value="Cancel"/>																

If the rate increase is the same for all the equipment shown:

1. Click the green arrow in the CPI Multiplier header.
2. Enter the percent increase. The same rate will be applied to all listed equipment.

If the effective date of the rate change is the same for all the equipment shown:

1. Click the green arrow in the Eff. Date header.
2. Enter the effective date. The effective date will then be set for all listed equipment.

You can select which specific rates to update by clicking the Update checkbox. To include all items:

1. Click the green arrow in the Update header.
2. The first time the green arrow is selected it will select all items. The second time the green arrow is selected it will deselect all items.
3. Click **[Update]**.

Manage Contract Billing Due

EMT has the ability to notify you when billing is due. There are two parts to this process:

- Billing Notification Setup
 - Billing notification setup is done on the Contract Information page. Refer to the **Contract Information** section for more information.
 - Enabling billing notification for the machine is set in the Machine Information page.

Billing Period Details				Flat Rate Billing: <input type="checkbox"/>	
Billing Interval		Billing Type	Days ▾	Start Date	May 01, 2018
					End Date
					May 01, 2019
PO Number	PRODUCT SUPPORT	Comments			

- Based on the billing parameters, EMT will notify you when billing is due for the equipment. You can set where on the dashboard you will be notified.

CSC Controlled:

PM Notification
 Repair Notification
 PM WorkOrder Review
 RS WorkOrder Review
 SOS Review
 Billing Notification
 SL Notification
 TAs

- Click on **Manage Contract Billing Due** to display the Manage Contract Billing Cycles page.

Back Update Cancel

Billing Start Date: Show Historical Billing

Show page: 1 (Total Records: 0) Records Per Page: 25 ▾

Equipment Cust#	Equipment Cust Name	Contract Cust#	Contract Cust Name	Serial Number	Make	Model	Eglo	EnrollmentNo	Meter SMU	LTD SMU	Billing Interval	Billing Type	Comments	Billing Start Date	Billing End Date	Billing Amount	PO Number	WO Number	Billing Date	Update
No Records Found!																				

Show page: 1 (Total Records: 0) Records Per Page: 25 ▾

Back Update Cancel

The Manage Contract Billing Cycles page:

- Displays all pending billings for the current month.
 - The start and end date can be changed to display a broader range.
- Click the Show Historical Billing checkbox to display any billing notifications that have already been updated as well as any outstanding items.
- The attributes of the billing period are displayed within the grid.

- This information is managed in the Contract Information page.
- You have the option to enter a Work Order Number.
- Enter the date the billing was sent.
 - This can be done manually or for all items by clicking on the green arrow in the header and entering in the billing date for all items.
- Update the billing item by clicking the Update checkbox, this can be done manually for each item or by clicking on the green arrow in the header.
- Click **[Update]** to save the data.
- Once the billing notification is saved, EMT will alert you when the next billing period occurs.

Manage Opportunities

Click **Manage Opportunities** to display the Opportunity Management page. Here you can view details of all opportunities.

Opportunity Management																																
Show page: 1 (Total Records: 1)																																
Equipment																																
Opp #	Equipment Cust#	Equipment Cust Name	Contract Cust#	Contract Cust Name	Serial Number	Make	Model	PSSR	Problem	Effect	Solution	Status	Date	Analyst	Store/CC	Name	Date	Missed Calls	Date	Missed Calls	Date	Missed Calls	Date	Name	Quote Required	Key	Description	Date	US\$	Discount	Date	
<input type="checkbox"/>	24	1123455	THW CONTRACTOR LTD	1123455	THW CONTRACTOR LTD	0AGV20718	CU	NT380	Murphy, Gavin				In Process	02 May 2019	demouser1 Demo		Betty Bean									Yes						
Show page: 1 (Total Records: 1)																																

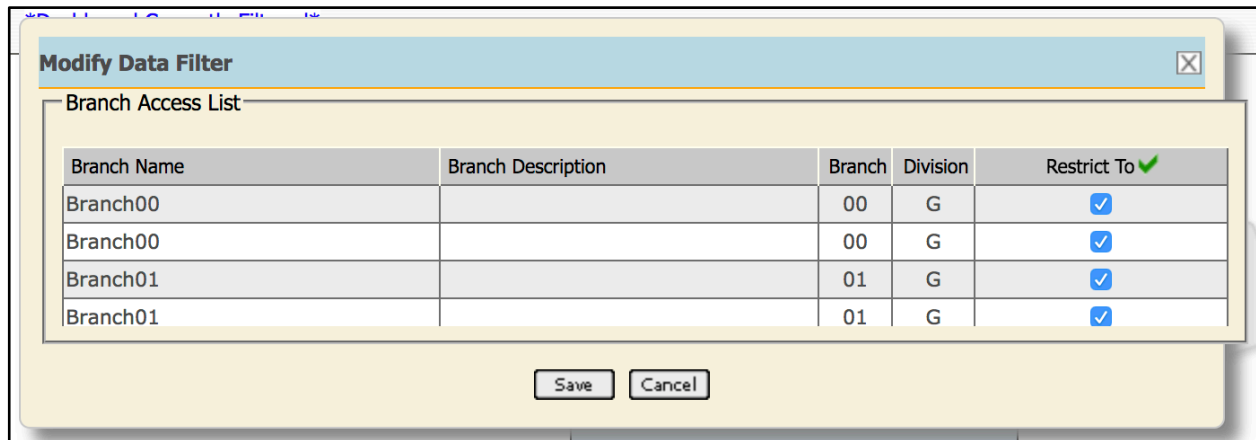
Click **[Edit]** to edit the details of an opportunity, or click **[Delete]** to delete an opportunity.

Add Opportunity:

1. Click **[Add]**. The Opportunity Detail Form will display.
2. Click **[Find Serial Number]**. A popup window allows you to search for a customer or piece of equipment.
3. Click the Select checkbox next to the customer or equipment you want to add an opportunity for, then click **[Select]**. The information for this customer or equipment will automatically be added to the form.
4. Enter all other required information into the form. You can also attach Quote Document and PO Document files.
5. Click **[Submit]** to create the opportunity, or **[Submit and Close]** to create the opportunity and close the Opportunity Detail Form window.

Modify Dashboard Filter

Modifying the dashboard filters relates to the branch that you would like to review. Select the box beside the branch filters that are to be applied to the numeric indicators on the Home page.



Click **[Save]**. The numbers on the dashboard will now only reflect the branches that are selected.

System Exceptions

Hover over the System Exceptions boxes to view what the number is indicating.

Machine Exceptions: Prevents system from successfully monitoring equipment. Machine Exceptions include:

- Equipment without Service Plan
 - Serial Number is being monitored by EMT but the Service Plan has not been set up.
- Custom registration isn't CSC controlled
 - A Custom subscription has been set up but the CSC Controlled flag has not been set.
- Last SMU Reading is less than Last PM Service SMU
 - The current SMU reading of the equipment is less than the SMU reading of the latest service.
- Less than or equal to 5 services remaining
- Billing Cycle not configured correctly (not all the billing details entered)
 - The serial number has been set to monitor billing due, but not all the billing parameters have been set on the Contract Information page.
- Service Events not set to the end of the contract (CEDTUG=2 By Hour)
 - There are not enough events to go to the end of the contract. This is based on contracts that end by hours.
- Service Events not set to the end of the contract (CEDTUG=1 By Date)
 - There are not enough events to go to the end of the contract. This is based on contracts that end by date.
- Service Events are created past the end of the contract (CEDTUG=2 By Hour)
- Service Events are created past the end of the contract (CEDTUG=1 By Date)

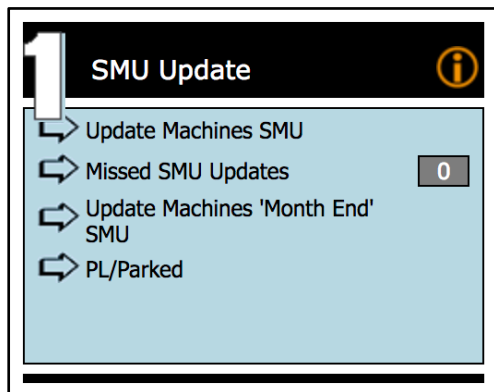
- Service Events not set to the end of the contract (CEDTUG=3 By Date or Hour)
- Service Events are created past the end of the contract (CEDTUG=3 By Date or Hour)
- Service SMU is Not Consistent with the Work Order SMU
- More than One Open CSA Contract

SMU Exceptions/Warnings: This number indicates equipment that has raised a flag during SMU retrieval from the Work Order System at the time of the work order closing.

Ownership Change/Ownership: If the contract owner or machine owner has changed in DBS it will appear in this list indicating that the information needs to be changed in EMT.

- On the Machine Information page, you have the ability to:
 - Sync the owning customer in EMT with the owning customer from DBS.
 - Sync the contract owning customer in EMT with the contract owning customer from DBS.
 - If the serial number is a custom subscription the contract owning customer can be manually entered.
 - A custom subscription is a serial number that does not have a CSA contract but EMT is still monitoring the equipment.

SMU Update



Valid SMU readings are important because EMT bases scheduling on the SMU readings. If the readings are not up to date then EMT will not be inaccurate when managing events.

This section and the SMU dropdown menu in the top navigation bar provide four links to the following functions.

Update Machines SMU

SMU from this page can be updated individually. To update an individual machine, use the search bar to locate the machine and enter the updated SMU reading in the New SMU Update box.

You can also update SMU readings by uploading an Excel file. Click **[Choose File]**, select your file, then click **[Upload]**.

Missed SMU Updates

Update Missed SMU																					
Back																	Update	CS			
Show page: 1 (Total Records: 3)																	Records Per Page:				
Equipment Cust#	Equipment Cust Name	Contract Cust#	Contract Cust Name	Serial Number	Make	Model	EqNo	LTD SMU	Meter SMU	Meter Updated	Default Branch	Actions	Frequency	Responsibility	Subscription Type	Contract Type	SMU Contact Name	SMU Contact Phone	SMU Contact Email	New SMU Update	Date
1273000	ACI CONSTRUCTION INC	1273000	ACI CONSTRUCTION INC	0DMG45538	AA	335F CR	0	0	2/8/2019		Contact	W1			LC	N/A					5/2/2019
1734775	FOB MECHANICAL SERVICES INC	1734775	FOB MECHANICAL SERVICES INC	DLXL93432	AA	34SDL	480	480	1/26/2019		Contact	W3	G2	M		J Welch	2121001123	ueqfqcycd.klzgmsrpf@vfgrmf.kcgbny.org			5/2/2019
1544650	HMT EXCAVATING & UNDERGROUND	1544650	HMT EXCAVATING & UNDERGROUND	0PQH45538	AA	320	1011	980	980	1/26/2019		Contact	(GPS)	G2	M	J Welch	2121001123	ueqfqcycd.klzgmsrpf@vfgrmf.kcgbny.org			5/2/2019
Show page: 1 (Total Records: 3)																	Records Per Page:				
Back																	Update	CS			

This list is populated two ways: when a reading has not been received through Product Link in 7 days, or based on the SMU Update Frequency on the Machine Information page an SMU reading has not been received.

If the equipment has a Product Link unit the SMU Update Frequency is disabled and the last date the unit has reported is displayed.

If the Product Link unit has not reported within 7 days you will have the ability to change the SMU Update Frequency. This is required if the unit is removed from the equipment and SMU will be done manually.

Update Machines “Month End” SMU

This displays a list of machines and their Life to Date (LTD) and Meter SMU readings that require a SMU reading for month end. To set the reading as the SMU for the month end, click the check box at the end of the row and then click **[Update]**. This will remove the machine from the list.

Month end SMU readings are used to calculate the monthly usage of the machine. This is useful if the dealer is using the Invoice Supporting reports.

Events Notification

	PM	RS
Active New Events	3	0
Expected Events	0	0
Next Pending Event	-	-
Overdue Scheduled Items	0	0
Service Letters	0	0
Service Letters Overdue	0	0

The Events Notification section displays events that have triggered a notification based on three types of services:

- PM (Preventative Maintenance)
- RS (Repair Service)
- SL (Service Letters)

The lists are populated based on the services indicated in the Machine Service tab of the Machine's page. The triggers are based on the Event Trigger set in the Additional Information section of the Machine Information tab.

Active New Events

Active events are services that are indicated in the Machine Service tab with a target SMU or target date that is on or within the Event Trigger.

For example, if the event trigger is set to 31 days and the next service date for the machine is within the 31 days, then the machine will appear in this list.

Expected Events

Expected events are services that are scheduled in the near future and are based on the target SMU or target date and the event trigger. The list is based on a date range that is calculated by the Event Trigger and the Service Date. A machine will appear on the list if the service date is double the trigger date to the trigger plus one.

For example, if the trigger is set to 30 days, the machine will show up on the list from 60 (double the trigger) days to 31 (trigger plus one) days before the service is due. Once the service is marked as Complete, it will be removed from the list. If not completed, it will appear in the Active New Events list because it is less than the trigger.

Next Pending Event

This list is the next event for all machines and is not based on any triggers. No numbers will appear in the boxes because they do not apply to these reports.

Overdue Scheduled Items

This list provides you with four links:

- **Serial Number:** Opens the machine Information page.
- **Follow-up:** View any follow-up communication made by email.
- **Action:** Sends an email to service department; when completed, the Follow-Up value will change to View.
- **Appt Status:** Opens a new window to the schedule from Service Scheduler.

If the service date or SMU target is passed in the Service Scheduler appointment over 7 days, it alerts in EMT.

Service Letters

This list displays all open service letters in EMT. To schedule an open service letter, click the Schedule checkbox next to a service letter and then click **[Schedule]**. To cancel an open service letter, click the Cancel checkbox next to a service letter and then click **[Cancel]**.

Service Letters Overdue

This list displays all service letters that have been open for more than 7 days without any action taken on them.

Review

Category	Red	Yellow	Green
Work Orders To Review (PM)	0	0	0
Work Orders To Review	0	0	0
Work Orders No Enrollment	0	0	5
CSA Equip Alert	1	1	13
Rental Equip Alert	0	0	0
Custom Sub Alert	0	1	12

The Review section displays Work Orders, Product Link, and SOS™ notifications that require review. The boxes in grey indicate the number of work orders that require review.

The colored boxes indicate the number of machines that have sent a fault code or SOS™ exception based on three levels: Green (Level 1, notification), Yellow (Level 2, monitor situation) and Red (Level 3, immediate attention required).

Work Orders To Review (PM)

This list displays work orders that are CSC initiated. You can also access the Work Order details and the Machine Details from this page.

CSC Initiated Work Order List (Not Reviewed)										
CSC Initiated	Work Order No	CustomerNo	Customer Name	Serial Number	Model	EqNo	Open Date	Close Date	Invoice Date	Records Per Page: 25
✓	942395	2500777	WASTE ALLIED	8323 09SW01	924G	1	5/14/2010	6/24/2010	6/24/2010	Records Per Page: 25

Select the Work Order number to review and approve all parts of the work order or just specific segments.

Work Order Review: 8375						
Customer Name: BULLDOG WASTE WHEEL WASH (8727750)			Life To Date SMU: 8375			
Model: AA			Meter SMU: N/A			
Serial Number: 888888888			Latest Appl: P91-0139 (Complete)			
Problem: Perform P91 due Immediate (Original Target 8104) Hour(s) Unit No:						
WorkOrder SMU: 8129			Enrollment Number: 2979/292007 - 9/27/2010			
Seg	Type	Seg Customer	T&M Amt	Flat Rate Amt	Billing Amt	Notes
01	Labour		\$260.00	F	\$228.85	IN CUSTOMER NOTES
01	Parts		\$134.04	F	\$196.37	CONTRACT RENEWED ON 6/26/10. NEED TO ADJUST
01	Misc		\$0.00	F	\$0.00	DECLINE AT 1250 THRU 1750 PER CONTRACT
Segment 01 Total			\$394.04		\$335.22	NOTE: ALL DISC ARE CHANGED AT 1000 HR INTERVAL CURRENT HR METER REPLACED IN 2006 ADD 4626 HRS TO CURRENT HOURS TO SEE ACTUAL HOURS.
<input type="checkbox"/> Approved						
Email Action						
02	Labour		\$0.00		\$0.00	REPLACE PRIMARY AIR FILTER
02	Parts		\$62.73		\$62.73	REPAIR IN PROCESS COMMENTS:
02	Misc		\$0.00		\$0.00	REPLACED PRIMARY AIR FILTER.
Segment 02 Total			\$62.73		\$62.73	
<input type="checkbox"/> Approved						
Email Action						
03	Labour		\$0.00		\$0.00	TOP OFF FLUIDS
03	Parts		\$60.84		\$60.84	REPAIR PROCESS COMMENTS:
03	Misc		\$0.00		\$0.00	ADDED 9 GALLONS LOW HYD TO HYDRAULIC ADDED 1 GALLON LOW TOTO TO FRONT DIFFERENTIAL.
Segment 03 Total			\$60.84		\$60.84	
<input type="checkbox"/> Approved						
Email Action						
99	Labour		\$190.00	F	\$175.00	TRAVEL TO/FROM DAILY CITY
99	Parts		\$0.00	F	\$0.00	TRAVEL ZONE 2
99	Misc		\$228.00	F	\$190.00	
Segment 99 Total			\$618.00		\$325.00	CHG-TRAVEL-ZONE CHARGE
<input type="checkbox"/> Approved						
Email Action						

Each segment contains the following:

- Work Order SMU: The machine's SMU on the day of the work order.
- Enrollment Number: CSA contract number based on date ranges, hours; set to expire but will still be listed.
- Seg: segment number
- Type:
 - Labor: select to view more detailed information
 - Parts: select to view more detailed information
 - Misc.: select to view more detailed information
- Seg Customer: Customer that the segment belongs to; if blank then it belongs to the customer but may be assigned to dealership for warranty work.
- T&M Amt
- Flat Rate Ind: Flat rate indicator which will be F (flat rate) or blank (not flat rate).
- Flat Rate Amt
- Billing Amt
- Notes: Any notes entered by the tech.
- Segment Totals: Total amounts of the three types of billing.
- Approved box: Select this box to approve this segment.
- Email Action: Emails service people to say that the segment is not correct for a specified reason.

The following buttons that appear at the bottom of the page perform the following functions:

[Cust. Search – WO Details] – Different view of the WO.

[Approve All & Update] – Approve all of the segments and/or update SMU and enrollment number.

[Update] – Update SMU and enrollment number.

[Cancel] – Cancel any changes to SMU, enrollment number, or individual approved checkboxes; any segment(s) that has been approved previously will remain approved.

After the WO is approved it is removed from the Work Orders to Review list.

Work Orders to Review

After the calculator file has been imported it matches the work order job and component codes to the work order segments. If there is a direct match (job and component code) the whole row is highlighted yellow and is separated from the other by a red line. If only the job or component code match, it is not highlighted but still appears above the red line.

NOTE: EMT does not use the data but the cost split is still a workable option for dealers to use.

Work Order Review: 0226487

Customer Name: WBT LIMITED (5305500) Life To Date SMU: 3792
 Make: AA Meter SMU: 3792
 Model: DBT Next Event: PM2-4042 (Due in 250.0 hours)
 Serial Number: 0KPFZ02925 Latest Appt: PM1-3792 ()

WorkOrder SMU: 413 Enrollment Number: 0415G00002(4/1/2004 - 9/20/2010)

Seg	Type	Seg Customer	T&M Amt	Flat Rate Amt	Flat Rate Amt	Billing Amt	Notes																																																
01	Labour	9022230	\$1,827.90	\$1,827.90	\$1,827.90		CUSTOMER COMPLAINT; REPAIR AIR CONDITIONER																																																
01	Parts	9022230	\$290.44	\$290.44	\$290.44		CAUSE OF FAILURE; HOSE RUBBING ON TURBO																																																
01	Misc	9022230	\$30.00	\$30.00	\$30.00		RESULTANT DAMAGE; BURNED HOSE AND LEA																																																
Segment 01 Total			\$2,148.34	\$2,148.34	\$2,148.34																																																		
<input type="checkbox"/> Approved <table border="1" style="width: 100%;"> <thead> <tr> <th>Scheduled</th> <th>Job Code</th> <th>Component Code</th> <th>Cost Split</th> <th>Occur.</th> <th>Prob.</th> <th>L/Hours</th> <th>Cost/Occurrence</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>023 - REPAIR</td> <td>7320 - AIR CONDITIONER</td> <td></td> <td>0</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>023 - REPAIR</td> <td>1000 - ENGINE</td> <td></td> <td>1</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>035 - TROUBLESHOOT</td> <td>1000 - ENGINE</td> <td></td> <td>1</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>020 - RECONDITION</td> <td>1000 - ENGINE</td> <td></td> <td>0</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> </tbody> </table>								Scheduled	Job Code	Component Code	Cost Split	Occur.	Prob.	L/Hours	Cost/Occurrence	<input checked="" type="checkbox"/>	023 - REPAIR	7320 - AIR CONDITIONER		0	1%	\$0.00	\$0.00	<input type="checkbox"/>	023 - REPAIR	1000 - ENGINE		1	1%	\$0.00	\$0.00	<input type="checkbox"/>	035 - TROUBLESHOOT	1000 - ENGINE		1	1%	\$0.00	\$0.00	<input type="checkbox"/>	020 - RECONDITION	1000 - ENGINE		0	1%	\$0.00	\$0.00								
Scheduled	Job Code	Component Code	Cost Split	Occur.	Prob.	L/Hours	Cost/Occurrence																																																
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<input type="checkbox"/>	020 - RECONDITION	1000 - ENGINE		0	1%	\$0.00	\$0.00																																																
99	Labour	9022210	\$220.50	\$220.50	\$220.50																																																		
99	Parts	9022210	\$0.00	\$0.00	\$0.00																																																		
99	Misc	9022210	\$175.00	\$175.00	\$175.00																																																		
Segment 99 Total			\$395.50	\$395.50	\$395.50																																																		
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Scheduled	Job Code	Component Code	Cost Split	Occur.	Prob.	L/Hours	Cost/Occurrence																																																
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Approve All & Update Update Cancel

Cost split is taking a segment and matching it between multiple job component codes. To split a cost of a segment, check the box of the job and component code and enter the percentage in the cost split box.

Work Order Review: 0226487

Customer Name: WBT LIMITED (5305500) Life To Date SMU: 3061
 Make: AA Meter SMU: 3061
 Model: DBT Next Event: PM1-3116 (Due in 55.0 hours)
 Serial Number: 0KPFZ02925 Latest Appt: PM2-2866 ()

WorkOrder SMU: 1779 Enrollment Number: 0415G00004(4/1/2004 - 6/9/2010)

Seg	Type	Seg Customer	T&M Amt	Flat Rate Amt	Flat Rate Amt	Billing Amt	Notes																																																
01	Labour	9022280	\$1,212.00	\$1,212.00	\$1,212.00		CUSTOMER COMPLAINT; MACHINE WILL NOT MOVE IN FORWARD GEARS																																																
01	Parts	9022280	\$156.19	\$156.19	\$156.19		CAUSE OF FAILURE; MODULATING VALVE																																																
01	Misc	9022280	\$0.00	\$0.00	\$0.00		RESULTANT DAMAGE; NONE																																																
Segment 01 Total			\$1,368.19	\$1,368.19	\$1,368.19																																																		
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Scheduled	Job Code	Component Code	Cost Split	Occur.	Prob.	L/Hours	Cost/Occurrence																																																
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<input type="checkbox"/>	012 - INSTALL	1054 - AIR FILTER ELEMENT		0	1%	\$0.00	\$0.00																																																
99	Labour		\$200.00	\$200.00	\$200.00		TRAVEL TIME AND MILEAGE																																																
99	Parts		\$0.00	\$0.00	\$0.00																																																		
99	Misc		\$175.00	\$175.00	\$175.00																																																		
Segment 99 Total			\$375.00	\$375.00	\$375.00																																																		
<input type="checkbox"/> Approved <table border="1" style="width: 100%;"> <thead> <tr> <th>Scheduled</th> <th>Job Code</th> <th>Component Code</th> <th>Cost Split</th> <th>Occur.</th> <th>Prob.</th> <th>L/Hours</th> <th>Cost/Occurrence</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>023 - REPAIR</td> <td>1000 - ENGINE</td> <td></td> <td>1</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>035 - TROUBLESHOOT</td> <td>1000 - ENGINE</td> <td></td> <td>1</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>020 - RECONDITION</td> <td>1000 - ENGINE</td> <td></td> <td>0</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>013 - REPLACE WITH EXCHANGE</td> <td>1000 - ENGINE</td> <td></td> <td>0</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>012 - INSTALL</td> <td>1054 - AIR FILTER ELEMENT</td> <td></td> <td>0</td> <td>1%</td> <td>\$0.00</td> <td>\$0.00</td> </tr> </tbody> </table>								Scheduled	Job Code	Component Code	Cost Split	Occur.	Prob.	L/Hours	Cost/Occurrence	<input type="checkbox"/>	023 - REPAIR	1000 - ENGINE		1	1%	\$0.00	\$0.00	<input type="checkbox"/>	035 - TROUBLESHOOT	1000 - ENGINE		1	1%	\$0.00	\$0.00	<input type="checkbox"/>	020 - RECONDITION	1000 - ENGINE		0	1%	\$0.00	\$0.00	<input type="checkbox"/>	013 - REPLACE WITH EXCHANGE	1000 - ENGINE		0	1%	\$0.00	\$0.00	<input type="checkbox"/>	012 - INSTALL	1054 - AIR FILTER ELEMENT		0	1%	\$0.00	\$0.00
Scheduled	Job Code	Component Code	Cost Split	Occur.	Prob.	L/Hours	Cost/Occurrence																																																
<input type="checkbox"/>	023 - REPAIR	1000 - ENGINE		1	1%	\$0.00	\$0.00																																																
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<input type="checkbox"/>	020 - RECONDITION	1000 - ENGINE		0	1%	\$0.00	\$0.00																																																
<input type="checkbox"/>	013 - REPLACE WITH EXCHANGE	1000 - ENGINE		0	1%	\$0.00	\$0.00																																																
<input type="checkbox"/>	012 - INSTALL	1054 - AIR FILTER ELEMENT		0	1%	\$0.00	\$0.00																																																

Approve All & Update Update Cancel

Clicking the Approved box and then clicking the **[Update]** button will approve the segments that have been selected. The approved segments will be removed and the outstanding segments will remain. If all segments are approved, click the **[Approve All and Update]** button.

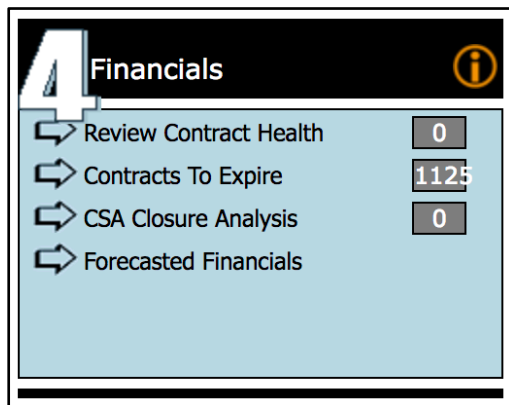
Work Orders No Enrollment

This list displays the same work order information as the other work order lists, however the equipment here is not currently enrolled in a CSA contract.

CSA Equip Alert / Rental Equip Alert / Custom Sub Alert

If your dealership also uses Uptake's Condition Monitoring application, clicking on any of these links will automatically open the application in a new tab. See the Condition Monitoring user guide for more information.

Financials



The Financials section displays alerts for current contracts, contracts that are about to close, and closed contracts. For active contracts, EMT also provides a report to forecast the end of contract variation.

Review Contract Health

This is a list of contracts that require review due to having a negative balance. This page can also display financial information at the individual serial number level.

Review CSA Financials																				
Back																		Submit		
Show page: 1 (Total Records: 1)																		Records Per Page: 25		
EnrollmentNo	Serial Number	StoreNo	Equipment Cust#	Equipment Cust Name	Contract Cust#	Contract Cust Name	Division	Start Date	End Date	Close Date	Service Revenue	Travel Revenue	Service Expense	Travel Expense	Reserve	CloseOut	Balance	Review	Comments	History Comments
0700G08121	0C9E01069	20	99E3002	BFX PROPERTY MANAGEMENT	99E3002	BFX PROPERTY MANAGEMENT	G	2/1/2007	1/31/2010		\$1,704.64	\$4,230.14		\$1,952.46	\$36.34	(\$4,441.62)	<input type="checkbox"/>		View	
Show page: 1 (Total Records: 1)																		Records Per Page: 25		
Back																		Submit		

Check the Review box and add comments, then click **[Submit]**. This removes the contract from this list and into the Equipment in Process list, where the contracts can be reviewed and marked as resolved.

Contracts to Expire

This is a color-coded list of contracts that are about to expire based on their Expires By column. Red means the contract has already expired, grey means it is close to expiring, and white means there is still time until the contract expires.

Review Contract Tracking About To Expire																							
Back Submit																							
Show page: 1 2 3 4 5 6 7 8 9 10 ... (Total Records: 1176) Records Per Page: 25																							
Serial Number	StoreNo	Equipment Cust#	Equipment Cust Name	Machine PPSR	Contract Cust#	Contract Cust Name	Contract PPSR	EnrollmentNo	Start Date	End Date	Sequence	Meter SMU	LTD SMU	Ending Usage	About To Expire	Days	Hours	Expiry Date	Expires By	Division	Review	Comments	History Comments
OACR69957	00	1650222	TLN EXCAVATING & UNDERGROUND	76	1650222	TLN EXCAVATING & UNDERGROUND	80	PLMH600257	01 Mar 2017	01 Mar 2018	of	0	545	0	D	-434		01 Mar 2018	D	G	<input type="checkbox"/>		
OACW45538	00	1092726	HSZ CONTRACTOR LTD	76	1092726	HSZ CONTRACTOR LTD	80	PLLAY00835	24 Mar 2016	24 Mar 2018	of	0	4909	0	D	-411		24 Mar 2018	D	G	<input type="checkbox"/>		
OACW45538	00	1092726	HSZ CONTRACTOR LTD	76	1092726	HSZ CONTRACTOR LTD	76	OLAY00835	24 Mar 2016	24 Mar 2018	of	0	4909	0	D	-411		24 Mar 2018	D	G	<input type="checkbox"/>		
OADC58265	00	1609049	WAS EXCAVATING & UNDERGROUND	63	1609049	WAS EXCAVATING & UNDERGROUND	86	PLRGS00702	27 Feb 2015	27 Feb 2016	of	0	2946	0	D	-1167		27 Feb 2016	D	G	<input checked="" type="checkbox"/>		
OADC58265	00	1609049	WAS EXCAVATING & UNDERGROUND	63	1609049	WAS EXCAVATING & UNDERGROUND	63	ORGS00702	22 Feb 2017	22 Feb 2019	of	0	2946	0	D	-76		22 Feb 2019	D	G	<input type="checkbox"/>		
OADM26272	00	1105595	FWP CONTRACTOR LTD	74	1105595	FWP CONTRACTOR LTD	75	AXX00384	28 Feb 2017	28 Feb 2019	of	0	13298	0	D	-70		28 Feb 2019	D	G	<input type="checkbox"/>		
OAFM45538	01	1753320	OED MECHANICAL SERVICES INC	87	1753320	OED MECHANICAL SERVICES INC	87	CRB00994	02 Sep 2016	02 Sep 2018	of	0	20326	0	D	-249		02 Sep 2018	D	G	<input type="checkbox"/>		
OAGH45538	00	1077275	ONS CONTRACTOR LTD	63	1077275	ONS CONTRACTOR LTD	95	OKTG00968	03 Dec 2015	03 Dec 2018	of	0	1293	0	D	-157		03 Dec 2018	D	G	<input type="checkbox"/>		
OAGJ58265	00	1042400	PJV CONSTRUCTION INC	93	1042400	PJV CONSTRUCTION INC	80	PLJWJ01287	01 Aug 2017	31 Jul 2018	of	0	3249	0	D	-282		31 Jul 2018	D	G	<input type="checkbox"/>		
OAGJ58265	00	1042400	PJV CONSTRUCTION INC	93	1042400	PJV CONSTRUCTION INC	93	OJWJ01287	10 Jul 2017	10 Jul 2018	of	0	3249	0	D	-303		10 Jul 2018	D	G	<input type="checkbox"/>		
OAJ69957	00	1516000	XYH CONSTRUCTION INC	85	1516000	XYH CONSTRUCTION INC	80	PLJ3R00761	09 Jan 2017	08 Jan 2019	of	0	3482	0	D	-121		08 Jan 2019	D	G	<input type="checkbox"/>		
OAJ84367	00	1302070	XEQ WELL DRILLING INC	85	1302070	XEQ WELL DRILLING INC	80	PLCNG01462	01 Aug 2017	31 Jul 2018	of	0	4875	0	D	-282		31 Jul 2018	D	G	<input type="checkbox"/>		
OAJD20718	00	1723550	SOC MECHANICAL SERVICES INC	79	1723550	SOC MECHANICAL SERVICES INC	80	PLLBPO1835	20 Jul 2016	31 Dec 2017	of	0	3004	0	D	-494		31 Dec 2017	D	G	<input type="checkbox"/>		

To remove the contract from the list, review the information (including the History Comments) and click the box in the Resolve column. After selecting all contracts that have been resolved, click **[Submit]**.

CSA Closure Analysis

The purpose of this report is to show contracts that have closed but still have a balance. Based on this information the user can review the contract and request a closeout amount be applied to the contract.

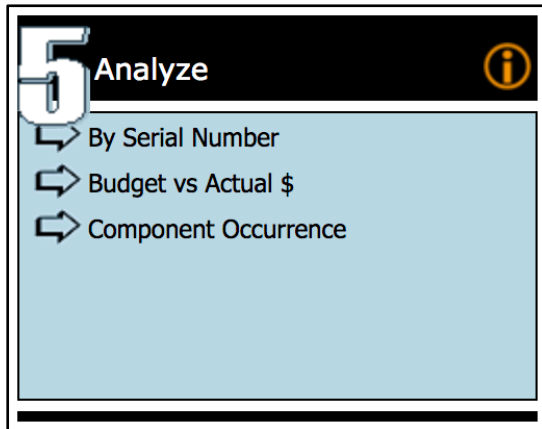
Forecasted Financials

The forecasted financial report displays both the current financial health of the contract and the predicted health at the end of the contract.

The future revenue is calculated based on the remaining hours of the contract and the hourly usage rate. The future expense is calculated based on the remaining hours and contract budget data that was manually added to the Contract Information page or automatically created when the Calculator file was imported.

You also have the option to add comments and show that a reserve or closeout amount has been requested.

Analyze



The Analyze section provides the dealer with visibility into the component financial and service occurrence budget vs actual values.

The financial related reports display the budgeted and actual values at both a summary and detailed level. The summary level of the reports looks at component ranges (1000 Engine, 2000 Hydraulics etc.). The Detail level of the reports looks at the individual component codes for the selected range (Turbo Cartridge Housing, Exhaust Manifold etc.).

The budget amounts are taken from the CAT Calculator files that are imported into EMT and the actual amounts are taken from work order segments.

By Serial Number

This report shows the budget and actual amounts associated with component ranges (Summary) or individual components (Detail).

The report allows you to search using a combination of:

- Serial Number
- Enrollment Number
- Model
- Customer Number

Click on the summary link to display the Work Order Review Page.

Work Order Review													
Serial No:	OK5K02635	Enrollment No:		Model:		Customer No:		Search					
Serial Number	Model	StoreNo	CustNo	CustName	EnrollmentNo	Division	Start Date	End Date	Start SMU	End SMU	Meter SMU	LTD SMU	View
OK5K02635	950H	07	7012550	OMEGA CONTRACTORS INC.	LON09T003	G	04/01/2009	03/31/2012	0	5810	1954	1954	Summary Detail
Show page: 1 (Total Records: 1) Records Per Page: 25													
Component Summary for Enrollment Number: LON09T003 and Serial Number: OK5K02635													
Component Range	First Interval	Next Interval	Budget Occurrences	Budget Total Cost	Actual Occurrences	Actual Cost							
1000-1999	974	973	1	\$1,785.93	21	\$3,465.14							
3000-3999			0	\$0.00	1	\$511.12							
4000-4999	6001	6000	2	\$534.50	1	\$329.60							
5000-5999	6001	6000	2	\$749.00	2	\$1,710.98							
6000-6999			0	\$0.00	3	\$2,217.88							
7000-7999	11883	11882	1	\$22,035.50	29	\$14,847.57							
T000-T999			0	\$0.00	1	\$383.96							
Show page: 1 (Total Records: 7) Records Per Page: 25													

Field Definitions:

- **Component Range:** Grouping of Component codes.
- **First Interval:** The SMU when the first event occurred in this component range.
- **Next Interval:** The SMU when the next event occurred in this component range.

- **Budget Occurrences:** Based on the CAT Calculator file that was imported to EMT; how many events in this component range that were budgeted to occur.
- **Budget Total Cost:** Based on the contract amounts that were imported into EMT from CAT Calculator.
- **Actual Occurrences:** Based on work order segments; how many occurrences of this range of events occurred.
- **Actual Cost:** Based on work order segments; the total amount for this component range.

Click the **[Detail]** button to display the budget and actual values for individual components. From here you can click on **[Budget Cost]** or **[Actual Cost]** to view more detailed information.

Budget vs Actual \$

The Budget vs Actual \$ report is an extension of the By Serial Number report, displaying the same data but allowing the user to compare up to 5 serial numbers at the same time. This report has the same summary and detail view, displaying budget and actual amounts.

Use the Search fields at the top of the page to search by serial number, contract number, and contract status, then select up to 5 different serial number/enrollment number combinations. Click **[OK]**.

Work Order Component Cost									
Serial Prefix: k5k		Contract Status: <input type="checkbox"/> Open <input type="checkbox"/> Select							
WorkOrder Component Cost Summary									
Component	SerialNumber 0K9K02635 EnrollmentID LON097003 Begin SMU 0 End SMU 5810 Meter SMU 1954 LTD SMU 1954		SerialNumber 0K9K02776 EnrollmentID RAN099002 Begin SMU 0 End SMU 5019 Meter SMU 184 LTD SMU 184		SerialNumber 0K9K02902 EnrollmentID CON097008 Begin SMU 0 End SMU 25007 Meter SMU 427 LTD SMU 427				View
	Budget	Actual	Budget	Actual	Budget	Actual			
0000-0999				\$0.00	\$249.11	\$0.00	\$92.33		Detail
1000-1999	\$1,783.00	\$3,465.14	\$0.00	\$539.68					Detail
2000-2999					\$0.00	\$1,626.05			Detail
3000-3999	\$0.00	\$511.12	\$0.00	\$221.02					Detail
4000-4999	\$535.00	\$329.60	\$0.00	\$5,841.20					Detail
5000-5999	\$749.00	\$1,710.98							Detail
6000-6999	\$0.00	\$2,217.88			\$0.00	\$3,782.44			Detail
7000-7999	\$22,036.00	\$14,847.57	\$0.00	\$17,880.29	\$0.00	\$4,967.55			Detail
8000-8999	\$0.00	\$5,085.42	\$0.00	\$159.59	\$0.00	\$159.59			Detail
9000-9999	\$0.00	\$383.96	\$0.00	\$219.30	\$0.00	\$859.98			Detail
Totals	\$25,103.00	\$23,466.25	\$0.00	\$30,036.02	\$0.00	\$11,487.94			
Show page: 1 (Total Records: 10)								Records Per Page: 25	

This portion of the report shows the comparison between budget and actual amounts for component ranges. Details relating to the serial number are displayed in the header of each serial number.

The budget information relates to the CAT Calculator data that is imported into EMT, and the actual information is related to the work order segments.

Click **[Detail]** to display the budget and actual amounts for individual components within the selected component range.

Component Occurrence

The Component Occurrence report is similar to the Budget vs Actual \$ report, except instead of showing budget and actual amounts it displays the budget and actual occurrences of events related to component ranges or specific components.

Use the Search fields at the top of the page to search by serial number, contract number, and contract status, then select up to 5 different serial number/enrollment number combinations. Click **[OK]**.

Work Order Component Occurrence																
Serial Prefix: k5k		Contract Status: <input type="checkbox"/> Open <input type="button" value="Select"/>														
Component Occurrence Summary																
Component	SerialNumber EnrollmentNo Begin SMU End SMU Meter SMU LTD SMU	Target	First Occ	Second Occ	Add Occ	SerialNumber EnrollmentNo Begin SMU End SMU Meter SMU LTD SMU	Target	First Occ	Second Occ	Add Occ	SerialNumber EnrollmentNo Begin SMU End SMU Meter SMU LTD SMU	Target	First Occ	Second Occ	Add Occ	View
1000-1999	1126 117			1155	Y			10								Detail
3000-3999	1501							6								Detail
4000-4999	6001 1724							20								Detail
5000-5999	6001 865															Detail
6000-6999	621												8	0		Detail
7000-7999	11001 359			1396	Y			13		13	Y		6	94		Detail
T000-T999	1501							605					8			Detail
Show page: 1 (Total Records: 7)														Records Per Page: 25		

The Target column displays the first occurrence of an event in the component range for each serial number. This information is imported from CAT's Calculator into EMT.

The First Occ. and Second Occ. columns display when the first and second occurrence occurred in this component range. This information is based on work order segments.

The Add Occ column displays when at least a third occurrence has occurred based on the work order segments.

Click **[Detail]** to display a list of the occurrences based on each individual component code.

EQUIPMENT TABS

Machine Information

Edit Machine Information

Customer Name: **ACJ CONSTRUCTION INC (1273000)**Life To Date SMU: Meter SMU: Next Event: N/A Latest Appt: N/A

Make: **AA**
 Model: **12M3AWDLR**
 Serial Number: **0GAQ43556**

Machine Information
Manage Templates
Scheduling
Contract Information
Lease Information
Machine Service
Additional History

Customer Details:

Subscription/Contract Owner* [Change](#)

Machine Owner* [Sync](#)

Invoice Customer

Invoice Contact [Get Default](#) [Set as Default](#)

Invoice Contact Phone

Invoice Contact Email

SMU Contact [Get Default](#) [Set as Default](#)

SMU Contact Phone

SMU Contact Email

Equipment Location

Location Contact [Get Default](#) [Set as Default](#)

Location Contact Phone

Location Contact Email

CSC Controlled:

PM Notification Repair Notification PM WorkOrder Review

RS WorkOrder Review SOS Review Billing Notification

SL Notification TAS

Subscription Period:

Start Date: End Date:

Machine Type:

CSA Equipment Rental Fleet Custom Subscription

Machine Details:

Branch*

EqNo

Make*

Model*

Serial Number*

Meter SMU Reading* Last Update: ()

Life to Date SMU

Broken Meter History: [Add New Broken Meter Reading](#)

Replaced at LTD SMU	Installed Meter SMU	Replaced Date	Option
No Records Found!			

Machine Service Group: [Add Child Machine](#)

Serial Number	Model	Make	Cust Name	Cust #	Option
No Records Found!					

Groups & Contacts:

Group Description	Group Name	FirstName	LastName	Fax	Email	Phone
brentTest - brent test77						
QA, EMT - Quality Assurance						
.....CANAM_test - testing						

[Add New Group](#) [Add New Contact](#)

Additional Information:

SMU Update Frequency * Last Updated:

Default Branch *

Coordinator Responsibility *

Analyst Responsibility

Fixed Interval

PM Code Hierarchy

Event Trigger By Usage

The Machine Information tab gives you the ability to configure attributes that are needed by EMT:

- Define contact information for
 - Invoice contacts
 - SMU contacts
 - Location contacts
- Machine Details
- The processes that EMT will monitor
 - PM notification
 - Repair Notification
 - PM work order review
 - RS work order review
 - SOS™ review
 - Billing Notification
- Subscription Period
- Type of machine
- Group contacts
- Broken hour meter entries
- Parent/child relationships
- How often EMT is expecting SMU updates
- Default branch that is responsible for the service
- Fixed or sliding interval

- Event triggers

Customer Details

The Customer Details section stores various types of contact information that will be used throughout the life of the contract:

- Contacts for Invoice questions
- Contacts for SMU questions
- Contacts for the equipment location
 - This information is used when creating appointments to populate the contact information.

The owner of the equipment and the owner of the contract are also displayed. If these are different, EMT will allow the user to sync the data from DBS.

CSC Controlled

This section controls which processes EMT will monitor for the equipment. In order for EMT to monitor the processes, the CSC Controlled checkbox has to be checked as well. The processes are:

- PM Notification
 - Display upcoming PM events in Box 2.
 - PM events are defined in the Manage Template page and applied to the machine in the Scheduling page.
- Repair Notification
 - Display upcoming repair services in Box 2.
 - These events are normally tied to a TM&R or Marc contract and imported from a Calculator file.
- PM Work Order Review
 - Allows you to review work orders that have been closed and are linked to PM events that originated from EMT. This is done in Box 3.
- RS Work Order Review
 - Allows you to review work orders that are linked to the serial number but are not linked to PM Events that originated from EMT. This is done in Box 3.
- SOS™ Review
 - Allows you to review SOS™ results in Box 3.
- Billing Notification
 - Allows you to track when billing is due for the serial number.
 - The billing periods and amounts are set up in the Contract Information page.
 - The billing notifications are displayed in the Shortcuts on the EMT dashboard.

Subscription Period

The subscription period is used to define the start and end date that EMT will monitor the equipment.

Machine Type

EMT has the ability to also manage other types of machines that don't have a CSA Contract.

- CSA Equipment
 - Equipment has an CSA contract.
- Rental Fleet
 - The equipment is rental.
- Custom Subscription
 - Equipment that does not have a CSA contract.
 - This can be used when you want to use EMT to notify Billing, Work Order to review, and SOS™ results to review.

Machine Details

Most of this information is brought in from DBS, except for the Meter SMU Reading. The SMU reading is automatically set if the equipment is configured with a Product Link unit. You can also enter the SMU reading manually.

Broken Meter History

EMT has the ability to track when SMU meters are replaced. This allows a meter to be replaced on the equipment while EMT continues to schedule appointments according to the life to date SMU reading on the equipment.

Machine Service Group

The Machine Service Group allows you to link equipment together for scheduling events. This feature is meant to be used for power systems; if a site has several generators that are on the same event schedule, event templates can be assigned to the parent machine. Then as events are scheduled the child machines are scheduled at the same time.

Groups & Contacts

Select the appropriate group from the list and then click the **[Update]** button at the bottom right of the screen.

Add New Group

To add a new group of contacts:

1. Click **[Add New Group]**. You will be taken to the Manage Group page.
2. Click **[Add New Group]**, then enter all necessary information.
3. Click **[Update]**. If the new group is a child of another group of contacts, choose the parent group from the drop-down menu.

Add New Contact

To add a contact:

1. Click **[Add New Contact]**. You will be taken to the Manage Contacts page.
2. Enter the new contact information into the form at the right of the page.
3. Click **[Update]**.

NOTE: Contacts can only be associated with one parent group.

Additional Information

The Additional Information section allows you to define attributes that are used in EMT to manage the various events.

- **SMU Update Frequency:** Indicates how often the SMU should be updated for the machine. It will be indicated by Day (D plus *num*), Week (W plus *num*) or Month (M plus *num*).
- **Default Branch:** The default cost center that will manage the service for this machine. When it is scheduled for service in the Service Schedule, it will use this as the cost center.
- **Responsibility Indicator:** Used as an indicator to show which person in the CSC group is responsible for the equipment.
- **PM Code Hierarchy:** EMT has the ability to define multiple PM Code hierarchies.
- **Fixed/Sliding Interval:** When configuring a machine you can choose between fixed or sliding interval scheduling services.
 - Fixed Interval: Services are scheduled based on the original template targets. If a new machine is set up to do services at the following SMU 250, 500, 750, 1000 etc., but the 250-hour service was actually done at 300 hours, EMT will trigger the next event at 500 hours.
 - Sliding Interval: Services are scheduled based on the original template intervals. If a new machine is set up to do services at the following SMU 250, 500, 750, 1000 etc., but the 250-hour service was actually done at 300 hours, EMT will trigger the next event at 550 hours, 250 hours after the prior service.
- **Event Trigger by Usage:** Setting the event trigger by usage controls how many hours before a service is due it's displayed in the Box 2 Active New Events. If a service is due at 1250 hours and the event trigger is set to 50, the event will not be displayed until the equipment has 1200 hours or more.
- **Event Trigger by Days:** Setting the event trigger by days controls how many days before an event EMT will display it in Box 2 Active New Events. Event trigger by days can be used on equipment that schedules events either by hours or days.

Manage Templates

PMC Schedule Management

Customer Name: **ACJ CONSTRUCTION INC (1273000)** Life To Date SMU:
 Make: **AA** Meter SMU:
 Model: **12M3AWDLR** Next Event: **N/A**
 Serial Number: **OGAQ43556** Latest Appt: **N/A**

Machine Information
Manage Templates
Scheduling
Contract Information
Lease Information
Machine Service
Additional History

Preventive Maintenance
Kidney Loop

Model: **12M3AWDLR** ▼

PMC List:

Model	Prefix	Description	Options

PMC Details:

Serial Prefix:

Description:

Primary Event Type: Hour Days Weeks Months Years Secondary PM Events

Runtime Based Events

PMCode	StartInterval	NextInterval	Cost	JobCode	ComponentCode	CheckList	Edit	Options

[Add](#)

<< Return To Working List

- Select Model Number from the listbox
- Fill in the SerialPrefix and Description
- Use *Add New PM* button to add new line for PM code
- Hit *Update* button

- Note:** Modifying this template will affect the event generation for all serial numbers that are linked to this template

Preventive Maintenance

PM templates are associated to an equipment model. Each model can have one or more templates defined.

- Primary Event Type: Event types can be Hours, Days, Weeks, Months, or Years.
- Secondary Events: Option to add additional events to the template. Secondary events are free text events that can be scheduled by Hours, Days, Weeks, Months, or Years. It does not matter what the Primary Event Type is set to.
 - Secondary events can be associated to a primary event. This means the secondary event will only be scheduled when the primary event is due.
- Runtime Based Events: The PM Code is associated with a start and next interval. You can also define the cost, job code, component code, and attach a checklist.

Kidney Loop

Kidney looping is the process of recycling fluids to be reused in machines. Kidney loop templates are associated with an equipment model. Each model can have one or more kidney loop templates.

Kidney loop templates allow you to choose which compartments to include in the kidney loop events, the intervals to perform them, and when to do the oil change event. Kidney loop events can also be associated to a PM event.

Scheduling

Equipment Scheduling

Customer Name: **ACJ CONSTRUCTION INC (1273000)** Life To Date SMU: _____
 Make: **AA** Meter SMU: _____
 Model: **12M3AWDLR** Next Event: **N/A**
 Serial Number: **OGAQ43556** Latest Appt: **N/A**

Machine Information | Manage Templates | **Scheduling** | Contract Information | Lease Information | Machine Service | Additional History

Preventive Maintenance | Repair Service | Kidney Loop

PM Scheduling:
 Select PM Plan from the list provided to setup Preventive Maintenance Schedule Plan. Click [\[here\]](#) to create new one!

Rules	Model	Prefix	Unit Code	Description	Last Modified	Action
<input type="checkbox"/>	Generic		Hour		9/4/2015 7:43:48 PM	Edit
<input checked="" type="checkbox"/>	Generic		Hour	500 hour intervals	9/30/2019 12:53:36 AM	Edit
<input type="checkbox"/>	Generic		Hour	General hourly based events	7/17/2013 4:55:35 PM	Edit
<input type="checkbox"/>	Generic		Mile	Mile Events	7/21/2012 8:35:33 AM	Edit
<input type="checkbox"/>	Generic		Month	Monthly	6/10/2014 9:17:57 AM	Edit
<input type="checkbox"/>	Generic		Hour	PM4	6/8/2014 9:54:26 AM	Edit
<input type="checkbox"/>	Generic		Month	Power Systems Monthly events	7/21/2012 8:36:11 AM	Edit
<input type="checkbox"/>	Generic		Year	test	3/13/2015 9:24:11 AM	Edit

PMCode	Start Interval	Next Interval	Unit	Cost	Job Code	Component Code	Checklist
PM2	500	500	Hour	0.0000	540	7525	-
PM3	1000	1000	Hour	0.0000	540	7526	-
PM4	2000	2000	Hour	0.0000	540	7527	-

Event Generation Parameters

First Service SMU: Last Service SMU: Start PM Code: Remove All Pending Events:

[Return To Working List](#)

Preventive Maintenance

Once a PM plan is selected from the Manage Templates tab event generation parameters will automatically be added, and are based on days and primary and secondary PM events intervals.

Latest events are ones that are already completed and can include work orders. They are used as a guideline when creating a new contract. If there were completed events, you may want to start the contract on a different date based on what was already completed.

Click **[Edit]** to edit the template. This will apply to all models associated with that template.

Repair Service

Repair Services can be imported into EMT in several ways:

- Import data from CAT's Calculator.
- Import data from an Excel file.
- Import from generic templates.
- Copy events from a different serial number.

NOTE: The import methods shown on this page are configurable.

Kidney Loop

This page gives you the ability to schedule kidney looping services for the machine.

Contract Information

Contract Information - 26321

Customer Name: **ACJ CONSTRUCTION INC (1273000)** Life To Date SMU:
 Meter SMU:
 Next Event: **N/A**
 Latest Appt: **N/A**

Make: **AA**
 Model: **12M3AWDLR**
 Serial Number: **OGAQ43556**

[Machine Information](#) | [Manage Templates](#) | [Scheduling](#) | [Contract Information](#) | [Lease Information](#) | [Machine Service](#) | [Additional History](#)

Customer Details:

PSSR: Karl Pena
MSR: Joyce Watson

Contract Details:

Show page: 1 (Total Records: 1) Records Per Page: 25 ↓

Contract #	Rev #	Contract Type	Start Date	End Date	End SMU	Closing Date	Option
PLN9P00252	0	N/A	01 Dec 2017	30 Nov 2020	0		View

Show page: 1 (Total Records: 1) Records Per Page: 25 ↓

Click on the view option to see contract details

[Contract Information](#) | [Budget](#) | [Financial Chart](#) | [Documents](#)

Contract Details

Start Date	12/1/2017	End Date	11/30/2020
Start SMU	0	End SMU	0

Current Rate

Current TM&R [\[Click to Add\]](#) CPI [\[Click To Set\]](#)

Rate Details

TM&R	Starting Hour	Effective Date	Change By	Change Date	Option

Billing Period Details Flat Rate Billing:

Billing Interval	Billing Type	Days ↓	Start Date <input type="text"/>	End Date <input type="text"/>
PO Number: PRODUCT SUPPORT	Comments			

Inclusions / Exclusions

[Return To Working List](#) | [Copy Contract Details](#) | [Update](#)

The Contract Information page shows a list of all current and past contracts that have been assigned to the current serial number.

For each contract the following details can be viewed:

- Contract Terms

For each contract the following details can be managed:

- Contract rates for the entire contract
- Billing period details
- Contract Inclusions
- Contract Exclusions
- Scanned images of the registration, contract and builder file

Contract Details

This section displays the contract start and end terms.

Current Rate

This section displays the current rate of the contract. EMT has the ability to track the rate over the life of the contract.

You can also set the month and date when rate of the contract can be adjusted. When the contract rate is due for an increase, the user will be alerted on the EMT dashboard. EMT will trigger an alert for a rate increase when the CPI month and day have passed and no new rate has been entered.

Rate Details

This section displays all the rates that are associated with this contract.

Billing Period Details

The billing period tracks when billing is due for this contract. This functionality is meant to notify the dealer when billing is due to prevent invoices that are either missed or sent out late. Edit the information in the Billing Period Details fields as needed.

When a contract is due for billing you will be notified on the EMT dashboard.

Once the billing period details have been entered the Billing Notification has to be enabled on the Machine Information page.

NOTE: This functionality does not issue the actual invoice.

Inclusions / Exclusions

This section defines what is and is not included in the contract.

Budget

The budget page allows you to enter the budgeted revenue and expenses. The data can be entered manually or populated based on the import of Calculator files.

Budgets can be broken into different periods:

- Divide the contract length into a set number of periods.
- Divide the budget into periods based on a number of hours.
- Divide the budget into periods based on a number of months.

The data entered into the budget is displayed in various places throughout EMT, including the contract health charts that appear in the Contract Information page and the Create Appointment page.

Financial Chart

The financial chart page displays the current budget and actual revenue and expenses for the serial number. This provides you with a quick summary of the performance of the contract.

Documents

The documents page allows you to upload documents to the contract. This keeps the details of the contract stored in one location.

Lease Information

Equipment Lease Information			
Customer Name: ACJ CONSTRUCTION INC (1273000)		Life To Date SMU:	
Make: AA			Meter SMU:
Model: 12M3AWDLR			Next Event: N/A
Serial Number: OGAQ43556			Latest Appt: N/A
Machine Information Manage Templates Scheduling Contract Information Lease Information Machine Service Additional History			
Equipment Details			
Machine ID	1000014209		
Make	AA	Serial #	DGAQ43556
Lease Details			
Lease Contract No		Lease Term	0
Lease Monthly Payment	0.00	Lease Residual Amount	0
Lease Start Date	May 13, 2019	Lease End Date	May 13, 2019
Lease Rate	0.00		
Dealership Residual Value	0		
CAT Finance Residual Value	0		
End Of Lease Conditions			
Powertrain Condition	0.00	%	Undercarriage Condition
			0.00 %
Lease Contract			
		Choose File	No file chosen
		Upload	
Back		Update	

If the equipment is leased, the lease information is manually entered into this tab.

Equipment Details

Make – two-digit DBS code.

Serial # – serial number of unit.

Lease Details

Lease Contract No

Lease Term

Lease Monthly Payment

Lease Residual Amount

Lease Start Date

Lease End Date

Lease Rate

Dealership Residual Value

CAT Finance Residual Value

End of Lease Conditions

Powertrain Condition – Percent of usage remaining when equipment is returned.

Undercarriage Condition – Percent of usage remaining when equipment is returned.

Lease Contract

You can upload files to support the contract, such as a scanned copy of the signed lease agreement.

Machine Service

Manage Machine History

Customer Name: **ACJ CONSTRUCTION INC (1273000)** Life To Date SMU: _____
 Make: **AA** Meter SMU: _____
 Model: **12M3AWDLR** Next Event: *N/A*
 Serial Number: **OGAQ43556** Latest Appt: *N/A*

Machine Information
Manage Templates
Scheduling
Contract Information
Lease Information
Machine Service
Additional History



Preventive Maintenance
Secondary Service
Kidney Loop
Repair Service
Service Letters

<< Return To Working List
Cust. Search - WO Details
Add
Delete
Schedule

Show page: 1 (Total Records: 14)														Records Per Page: 25				
PMCode	Interval	Type	Status	Target SMU	Target Date	Service SMU	Service Date	Work Order No	Appt Status	Escalated From	Check List	Comment	Manual Entry	Change By	Change Date	Delete	Schedule	Action
PM2	500	Hour	Pending	500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM3	1000	Hour	Pending	1000										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	1500	Hour	Pending	1500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM4	2000	Hour	Pending	2000										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM2	500	Hour	Pending	2500										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule
PM3	1000	Hour	Pending	3000										demouser2 Demo	08 Feb 2019	<input type="checkbox"/>	<input type="checkbox"/>	Schedule

<< Return To Working List
Cust. Search - WO Details
Add
Delete
Schedule

Preventive Maintenance

This section details a list of services that are part of the recommended Preventive Maintenance routine. An icon will indicate if a service was escalated () or is pending a SMU sync () with Service Scheduler and/or related Work Orders.

Selecting the PM code in the first column allows you to edit the service record:

Event Details

- Event: Using the drop-down menu, choose the code that the event represents.
- Event Type: Hours, days, weeks, or months and is based on the template created for the event.
- Status: Select the status of this particular event.
- Checklist: Populated with checklists created for the specific model.
- Comment: Any additional comments about the event.

Target Details

- Target Meter: Enter the life-to-date SMU which this service should be done by.
- Target Date: Enter the date SMU which this service should be done by.

Appointment Details (completed in service scheduler and syncs with EMT)

- Service Meter: The SMU reading when the service is completed.
- Service Date: Date of the service.
- Work Order No: Work order that was created from the service.
- Segment No: Enter segment number if a particular segment of the work order applies.

Current Meter Reading: Pulled in through Product Link or manually entered when SMU is updated.

Machine Information Manage Templates Scheduling Contract Information Lease Information Machine Service Additional History																
Preventive Maintenance Secondary Service Kidney Loop Repair Service																
Cust. Search - WO Details																
Show page: 1 (Total Records: 12) Records Per Page: 25																
PWCode	Type	Status	Target SMU	Target Date	Service SMU	Service Date	Work Order No	Appt Status	Escalated From	Check List	Comment	Manual Entry	Change By	Change Date	Delete	Schedule
PM1	Hour	Completed	1	3/6/2008	1	3/6/2008	test				Created by EMT V4 Conversion	✓	Monica Vogt	3/6/2009	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PM1	Month	Completed		2/24/2009		3/17/2009	2460096						Paul Zdane	9/29/2009	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Cancelled	975	3/6/2009	975	3/6/2009	test				Created by EMT V4 Conversion	✓	Monica Vogt	7/1/2010	<input type="checkbox"/>	<input type="checkbox"/>
PM2	Month	Completed		6/12/2009		6/24/2009	2461892						Paul Zdane	9/29/2009	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Missed		8/6/2009									Paul Zdane	9/29/2009	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Completed		9/8/2009		9/24/2009	2463210						Paul Zdane	9/29/2009	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Missed		10/6/2009									Paul Zdane	9/29/2009	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Completed		11/4/2009	137	12/2/2009	2464186						Monica Vogt	1/28/2010	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Cancelled	137	12/6/2009	137	12/6/2009							Monica Vogt	7/1/2010	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Completed	137	5/3/2010	137	5/3/2010	2466932						Monica Vogt	7/1/2010	<input type="checkbox"/>	<input type="checkbox"/>
PM2	Month	Pending		7/5/2010									Monica Vogt	1/28/2010	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Month	Pending		10/4/2010									Monica Vogt	1/28/2010	<input type="checkbox"/>	<input type="checkbox"/>
Show page: 1 (Total Records: 12) Records Per Page: 25																
Cust. Search - WO Details																
Add Delete Schedule																

Add – The **[Add]** button provides the same fields as when you edit an existing service type.

Delete – The **[Delete]** button gives you the option to delete any or all of the scheduled services.

Schedule – To bulk schedule one or more items, click the Schedule checkbox and then click **[Schedule]**. This will send all the selected items to the Service Scheduler.

Secondary Service

The Secondary Service page displays a list of secondary events that have been generated for the serial number. This list will display both events that have been completed and events that are still pending.

Secondary events can be deleted by clicking the Delete checkbox and then clicking the **[Delete]** button.

Secondary events can be modified by clicking on the Description link.

Kidney Loop

The Kidney Loop page displays a list of kidney loops associated with the asset serial number.

Kidney loops can be deleted by clicking the Delete checkbox and then clicking the **[Delete]** button.

Kidney loops can be modified by clicking on the Compartment link.

Repair Service

The Repair Service page displays a list of repair service events that have been generated for the serial number. This list will display both events that have been completed and events that are still pending.

Repair service events can be deleted by clicking the Delete checkbox and then clicking the **[Delete]** button.

Repair Service events can be modified by clicking on the Job Code Description link.

To schedule an event, click the Schedule checkbox and then click **[Schedule]**.

Service Letters

The Service Letters page displays a list of service letters associated with the serial number.

Click on the PIPNo link to edit the service record.

To schedule a service event, click the Schedule checkbox and then click **[Schedule]**.

Additional History

Customer Name: ACJ CONSTRUCTION INC (1273000) Life To Date SMU:
 Make: AA Meter SMU:
 Model: 12M3AWDLR Next Event: N/A
 Serial Number: 0GAQ43556 Latest Appt: N/A

Machine Information | Manage Templates | Scheduling | Contract Information | Lease Information | Machine Service | **Additional History**

SMU | Product Link | PL Datafeed Exceptions | Scheduled Oil Samples | Work Order | Communication | CM Cases

Show page: 1 (Total Records: 0) Records Per Page: 25

SMU	User	Change Date	Month End SMU	Month	Year	Action
No Records Found!						

Show page: 1 (Total Records: 0) Records Per Page: 25

This section displays important information regarding the machine's history. History can play an important part in determining when and if a machine requires a particular service, product parts, etc.

SMU

SMU is entered manually or through Product Link. The histories of the entries are listed here.

To set the SMU reading, click the box below Month End SMU and then click **[Set]**.

To delete the reading, click **[Delete]**.

Product Link

The Product Link section provides a history of the fault codes sent by the equipment and displays the following information:

- Module: Module the fault was detected on.
- Level: Severity level.
- Occurrence: How many times this fault code has occurred.
- Event: The PL event that is recorded.
- Component: The component on the equipment that the event occurred.
- Event Date: The date the event happened.
- 30/60/90: How many times the event has happened in the last 30, 60, or 90 days.
- Resolved: Through the review process in Box 3 of the dashboard.

Scheduled Oil Samples

A list of submitted oil samples and their results are displayed here.

Evaluation levels are related to the severity of the SOS™ review. 1 is Red, requires attention. 2 is Yellow, monitor compartment. 3 is Green, no action required.

The list indicates if the SOS™ sample has been reviewed in the SOS™ Review list on the dashboard.

NOTE: SOS™ samples are displayed on this page whether or not Review SOS™ Samples has been selected on the Machine Information page.

Work Order

This page displayed a history of work orders associated with the equipment. You can view the work order history in Segment View or Invoice View. Click on a work order to view its details.

Communication

The communication page displays a list of communications that are linked to the serial number. Communication items are created in the following events:

- Create Appointment
- Closure Analysis
- Contract Review
- Contract Expiry
- Down Time Report
- Overdue PM Event
- Overdue RS Event
- Product Link Fault Codes
- SOS™ Sample Review

The information that is sent in an email or written in a comment is stored with the communication item.

ADMIN MENU

Manage Branch Managers





































In sections of EMT where there is an email function, the email will default to the branch manager that is assigned unless it is overwritten.

Click **[Assign]** to assign a default branch manager.

Manage Users



Users are granted access based on what they need to do within EMT:

- EMT admin: Access to everything except Manage Deleted Equipment.
- Read Only: Access to view everything only.
- Report View: Access to forecasted financial (box 4) only.
- Service Scheduler: Access to machine service tab and contract tab in Machine Information, which allows Service Scheduler users to view contract related details in EMT.
- Superuser: Access to everything.
- User Admin: Has the ability to add other users.

User Administration									(Secure)
Flag	Name	Title	Login Name	Office	Company	Comments	Last Access	Changed By	Add
	 Ayers, Diana	Development Consultant	CloudLink\Frank363		Canam Solutions Inc		Feb 5, 2018 11:00 AM	on	 
	User Type: EMTAdmin, SuperUser								
	 CLMonitor, cloudlinkmonitor		CloudLink\cloudlinkmonitor			Lorem ipsum dolor sit amet	May 13, 2019 12:30 PM	demouser2 on Jun 6, 2018	 
	User Type: EMTAdmin, SuperUser								
	 CLMonitor, cloudlinksoc		CloudLink\cloudlinksoc			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jun 6, 2018	 
	User Type: EMTAdmin, SuperUser								
	 Demo, aclay		CloudLink\aclay			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jan 22, 2019	 
	User Type: EMTAdmin, SuperUser								
	 Demo, adait		CloudLink\adait			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jun 21, 2018	 
	User Type: EMTAdmin, SuperUser								
	 Demo, adistler		CloudLink\adistler			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jan 22, 2019	 
	User Type: EMTAdmin, SuperUser								
	 Demo, agomez		CloudLink\agomez			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Mar 5, 2019	 
	User Type: EMTAdmin, SuperUser								
	 Demo, ahmeds		CloudLink\ahmeds			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jul 3, 2018	 
	User Type: EMTAdmin, SuperUser								
	 Demo, ajanderson		CloudLink\ajanderson			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Nov 6, 2018	 
	User Type: EMTAdmin, SuperUser								
	 Demo, alice.hultquist		CloudLink\alice.hultquist			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Aug 29, 2018	 
	User Type: EMTAdmin, SuperUser								
	 Demo, allarj		CloudLink\allarj				<Never Access>	demouser2 on May 3, 2018	 
	User Type: Downtime, EMTAdmin, ReadOnly, ReportView, ServiceScheduler, SuperUser								
	 Demo, amessaoudi		CloudLink\amessaoudi			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jan 22, 2019	 

To add a new user to the system:

1. Click the **[Add]** button.
2. Search for the user by their last name, (note that at least three characters are required).
3. Select the user type. Enter any comments if needed.
4. Click **[Add]**.

-  To edit any user's access or comments, select the Pencil icon located in the user's row.
-  To remove a user's access, select the red X icon located in the user's row.

Manage User Division / Branch Access

Manage User Branch Mapping					
User Name	Title	Company	Last Login Date	Email	Options
aclay Demo				aclay@holtca.com	Edit
adar Demo				trevis.adar@gmail.com	Edit
adistler Demo				adistler@holtca.com	Edit
agomez Demo				agomez@foleyinc.com	Edit
ahmeds Demo				sami.ahmed@uptake.com	Edit
ajanderson Demo				aj.anderson@uptake.com	Edit
alice.hultquist Demo				alice.hultquist@ringpower.com	Edit
allarj Demo				jay.allardyce@uptake.com	Edit
amessaoudi Demo				abdelghani.messaoudi@tractafrica.com	Edit
andy.debrulin Demo				andy.debrulin@goughcat.co.nz	Edit
atuttle Demo				atuttle@holtca.com	Edit
banasa Demo			03/28/2018	anna.banaszak@uptake.com	Edit
banderson Demo				banderson@foleyinc.com	Edit
banyac Demo			07/19/2018	cbanyard@wheelercat.com	Edit
blaxir Demo			07/04/2018	richard.blaxill@westrac.com.au	Edit
boothg Demo				gbooth@unatrac.com	Edit
brad.tuskowski Demo			10/17/2018	brad.tuskowski@zieglercat.com	Edit
brian.martinez Demo				brian.martinez@ringpower.com	Edit
bsilva Demo			10/23/2018	brian.silva@uptake.com	Edit
btornetta Demo				btornetta@foleyinc.com	Edit
bulda Demo				danielle.bull@westrac.com.au	Edit
bwalker Demo				beverly.walker@ringpower.com	Edit
callac Demo				cameron.callaway@westrac.com.au	Edit
cannak Demo				kari.cannaday@uptake.com	Edit
carlea Demo				anthony.carle@hastingsdeering.com.au	Edit

This page allows you to assign access to particular divisions and branches for each user.

1. Click the **[Edit]** button.
2. Choose the appropriate division(s) and branch(s) for the user.
3. Click **[Save]**. If the security is created by division then the user will have access to all branches that belong to that division.

Manage Dormant Equipment

Dormant Machines							
Machine Serial No	Modem Id	Make	Last Report Date	Comments	Made Dormant On	Made Dormant By	Bring Alive
H3K01409	DQCAT0049058	AA	8/14/2010 12:00:00 AM	N/A	8/16/2010 11:01:20 AM	Paul Zdane	Bring Alive
MWP03332	DQCAT0018186	AA	8/6/2010 12:00:00 AM	N/A	8/16/2010 11:01:29 AM	Paul Zdane	Bring Alive

When the Product Link installed on the equipment is no longer reporting, it places the equipment on this list. Click **[Bring Alive]** to remove the machine from the Dormant Machines list.

Manage Deleted Equipment

Deleted Machine List														
Back Submit														
Show page: 1 2 3 4 5 6 7 8 9 10 ... (Total Records: 441)													Records Per Page: 25	
Equipment Cust#	Equipment Cust Name	Contract Cust#	Contract Cust Name	Serial Number	Branch	Make	Model	EqNo	EnrollmentNo	StartDate	EndDate	CloseDate	Division	Make Comeback
		1184366	GZY CONTRACTOR LTD	0QRK45538	01	GN								<input type="checkbox"/>
		1186550	CNW CONSTRUCTION INC	0WUI72225	01	GN								<input type="checkbox"/>
		1186600	OQC CONTRACTOR LTD	0IMU45538	01	AA								<input type="checkbox"/>
		1186600	OQC CONTRACTOR LTD	0BK45538	01	AA								<input type="checkbox"/>
		1188450	MSZ CONTRACTOR LTD	0XGI93432	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0PKF72225	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0FBJ72225	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0VHF72225	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0HED45538	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0BOW72225	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0FOJ45538	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0FST93432	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0XIW93432	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0XLK72225	01	AA								<input type="checkbox"/>
		1189050	FKI CONTRACTOR LTD	0HNI93432	01	AA								<input type="checkbox"/>
		119748L	VIB CONTRACTOR LTD	0VZF72225	01	PV								<input type="checkbox"/>
		119748L	VIB CONTRACTOR LTD	0VZF72225	01	PV								<input type="checkbox"/>
		1206650	JEU WELL DRILLING INC	0TFB72225	01	AA								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0EBC72225	01	AA								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0CB45538	01	AA								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0SRZ93432	01	AA								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0IAT72225	01	PN								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0EZG72225	01	DJ								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0GJN72225	01	DJ								<input type="checkbox"/>
		1208250	DME CONTRACTOR LTD	0KDB45538	01	JD								<input type="checkbox"/>
Show page: 1 2 3 4 5 6 7 8 9 10 ... (Total Records: 441)													Records Per Page: 25	

This page displays a list of equipment that was manually deleted by users. To reinstate the equipment(s), click the Make Comeback checkbox and then click **[Submit]**.

Manage Checklists

Manage Checklists										
									Import Add	
Show page: 1 (Total Records: 3)										Records Per Page: 25
PM Service	name	Type	Model	Serial Number	Serial Range	Active Since	Description	Options		
PM1	PM1	CAT	933C	0LSH45538	00001-99999	17 May 2013		Edit	Delete	
PM2	PM2	CAT	933C	0LSH45538	00001-99999	29 Aug 2011		Edit	Delete	
PM4	PM3	CAT	272C	0LSH45538	00001-99999	29 Aug 2011		Edit	Delete	
Show page: 1 (Total Records: 3)										Records Per Page: 25
									Import Add	

There are two methods to add checklists to the system:

Import

1. Click **[Import]**.
2. Click **[Choose File]** and select your .mbd file. These types of files are usually provided by CAT.
3. Click **[Load]**.

Add

1. Click **[Add]**.
2. Enter the checklist details into the form fields.
3. Click **[Add]** to search for particular checklist items to add.
4. Click **[Copy]** to add all items from a chosen checklist.
5. Once all items are added, click **[Submit]**.

To edit an existing checklist:

1. Click **[Edit]**.
2. Edit any information in the form fields.
3. Click **[View Parts]** to add, edit, or delete any parts.
4. Click **[Submit]**.

View Communication History

The communication page displays a list of communications details. Communication items can be filtered by a date range at the top of the page.

Communication items are created in the following events:

- Create Appointment
- Closure Analysis
- Contract Review
- Contract Expiry
- Down Time Report
- Overdue PM Event
- Overdue RS Event
- Product Link Fault Codes
- SOS™ Sample Review

The information that is sent in an email or written in a comment is stored with the communication item. Any files that were attached to the communication are also saved and can be viewed here.