



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

4/9/2025 12:39 PM

## NAME OF PROCESS

## Creating a Due for Service Report [Roleplay]

## Use Case / Objectives

This guide will walk you through how to run the Equipment Due for Service Report. Equipment appears on this report when it has one or more work steps associated with it that have been marked as Maintenance = Y, and the time frame for performing any one of those maintenance steps for the equipment has arrived.

## Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

**Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.**

Menu options to access:

Equipment Maintenance => Equipment Due for Service Report

## Reporting

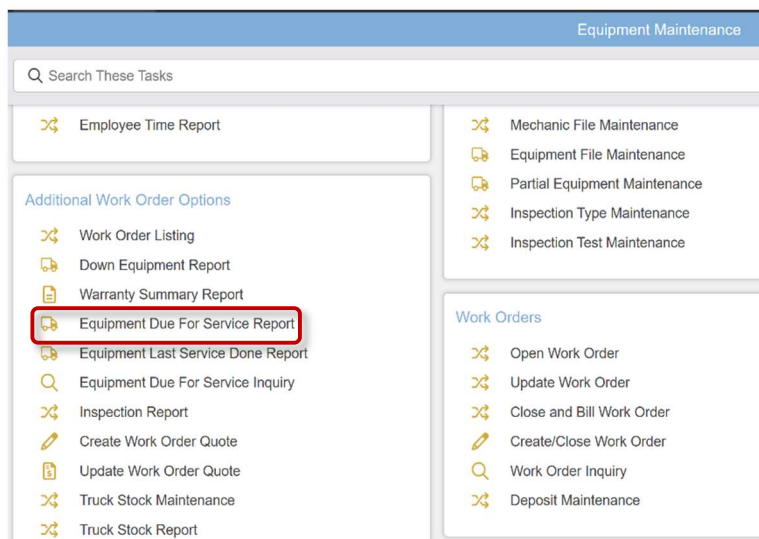
Equipment Due for Service Report

## Creating a Due for Service Report

### How to Run the Equipment Due for Service Report

#### Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen does not appear automatically, select **Equipment Maintenance** from the left toolbar.
3. In the **Additional Work Order Options** section, click the **Equipment Due for Service Report** option.



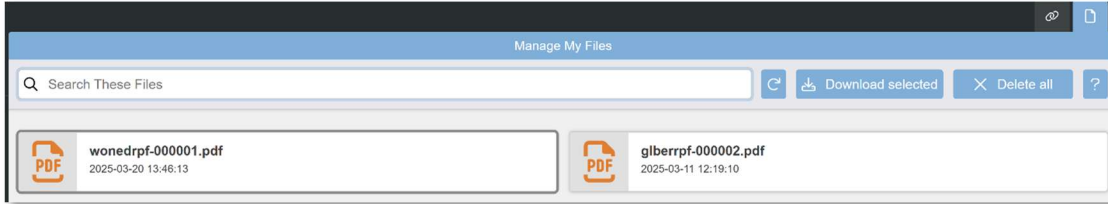
- a. The **Equipment Due for Service Report - Launch** screen opens.

The screenshot shows the 'Equipment Due For Service Report' launch screen. The header displays the date and time '3/20/25 13:03:19', the title 'Equipment Due For Service Report', and system information 'Sys: DEMO V12' and 'Cmp: RM Loc: LGB'. The main area contains several input fields and options:

- Report type:  D (D=Detailed S=Summary)
- Date range:
- Catg/Class/Sub:    Update File :  N (Y/N)
- Equipment #:
- Equipment type:  R    Status:
- Customer #:  Job #:
- D/L # if Cash Cust:
- Company project #:
- Step #:
- Generate SMF's:  N (Y/N) Only include Eq on rent >  days.  
Only include Eq valued at >
- Territory:  (I=Include 0=omit)
- 
- Save report as file:  (.DS will be appended)
- in library:



7. Click the **Manage My Files** icon.
  - a. The **Manage My Files** screen opens, displaying your files. **NOTE:** The files will be named after the control record of the screen the report pulled from.



8. Click the **Open** icon next to the desired file.



- a. The **Equipment Due for Service Report** opens, displaying data for the criteria entered.

```

3/20/25  1:59:08 PM                WYNNE SYSTEMS, LLC                Cmp:  RM
System: DEMO V12                    Equipment Due For Service Report    Loc:  LGB
Pgm Id: WONEDR                      Date range: 1/01/25 thru 3/20/25  Page:  1
Include locations LGB

Equipment types:
Eqp #    Proj#   Cat/Cls/Scl T Make      Model      Serial #      Loc  City,St      Lst Mnt. Customer DateOut
Territory: 000
2386          072-0100-00 R CLASSIC   14          CP14-7      LGB  LONG BEACH,CA  6/05/23
CLASSIC PLUS 14 PORTABLE AIR CONDITIONER  Sts/Cus: RETURNED - NEEDS CHECK OUT
93 REPLACE AIR FILTER 11/25/07 WO#:
2388          072-0100-00 R CLASSIC   14          CP14-8      LGB  LONG BEACH,CA  6/05/23
CLASSIC PLUS 14 PORTABLE AIR CONDITIONER  Sts/Cus: RETURNED - NEEDS CHECK OUT
93 REPLACE AIR FILTER 11/25/07 WO#:
2391          072-0100-00 R CLASSIC   14          CP14-9      LGB  LONG BEACH,CA  6/05/23
CLASSIC PLUS 14 PORTABLE AIR CONDITIONER  Sts/Cus: AVAILABLE
93 REPLACE AIR FILTER 11/25/07 WO#:

*** END OF REPORT ***
    
```

## Reference Glossary

### Field Definitions for Tasks

#### Equipment Due for Service Report - Launch

- **Report Type** - Indicate whether the report should be generated in Detail (D) or Summary (S).
- **Date Range** - Enter the beginning and ending dates to include in the report.
- **Category/Class/Subclass** - Enter the IDs of the equipment category, class, and subclass for which you want to review equipment due for service. If you do not know the IDs, press F4 in the applicable field to search for each one.
- **Equipment** - Displays the number of the equipment that is due for service. If you do not know the number, press F4 to search for it.
- **Equipment Type** - Enter the codes of the equipment types that you want to include (I) or omit (O) in the equipment due for service list.
- **Equipment Status** - Enter the codes of the equipment statuses that you want to include (I) or omit (O) in the equipment due for service list. If you do not know the code, press F4 to search for it.
- **Customer Number** - Enter the number of a customer for which you would like to review equipment they have on rent that is due for service. If you do not know the number, press F4 to search for it.
- **Job Number** - Enter the number of a job for which you would like to review equipment that is on rent and that is also due for service. If you do not know the number, once you have entered the **Customer Number** press F4 to search for it.
- **Drivers License Number (if cash customer)** - Enter the two-letter abbreviation for the state on the customer's driver's license and the number.
- **Project Number** - Enter the number of a project for which you would like to review equipment that is on rent and that is also due for service. If you do not know the number, press F4 to search for it. **NOTE:** A project number can be assigned across multiple customers; therefore, if you create a project and assign multiple customers to that project, you will be able to see all equipment out on rent for the entire project.
- **Step number** - Enter the number assigned to a specific step. If you do not know the number, press F4 to search for it.
- **Generate SMF's (scheduled maintenance forms)** - If set to Y, the report will generate Scheduled Maintenance Forms. If set to N, it will not.
- **Only include equipment on rent > (greater than) days** - Enter the number of days to include equipment on rent.
- **Only include equipment valued at > (greater than)** - Enter the net cost of the equipment that will be ordered under this configuration.
- **Territory** - Territories entered here will be included or omitted from the report based on the value entered in the include/omit parameter.
- **Save report as field** - Key in file name and library to save this information in a PC file.

- *In Library* - Key in file name and library, to save this information in a PC file.