



Service Dispatch Jobsite Component Basics

September 2017

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Overview

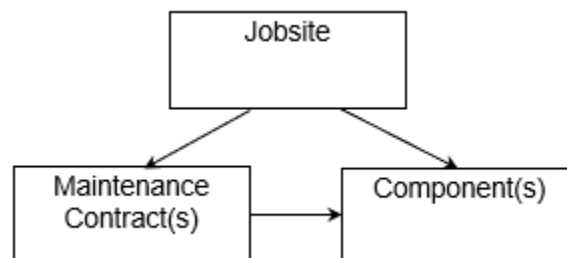
Components records in Ascente are used for accumulating relevant information for a major mechanical component at the jobsites you service such as HVAC units, condensers or water heaters. The information includes the following:

- Manufacturer
- Model #
- Serial #
- Warranty & Installation Date
- Capacity
- Maintenance Contracts this component is covered by
- Developing maintenance schedule and *Tasking* for a component.

Components make possible the following:

- Tracking service history and costs by component.
- Providing maintenance history by component.
- Marketing based on component install & warranty dates.
- Optionally providing component information on your invoice forms for the components serviced.

This document will discuss how *Jobsite Component* records are created and maintained in Ascente. These are also referred to as *Local ID's* or *Equipment* records by some companies. All components will reference an existing jobsite record (*service location*). A jobsite can have multiple components linked to the jobsite. These are used to manage and track major mechanical components that are installed and maintained and possibly covered under a maintenance contract. In the HVAC industry more and more, it is becoming a requirement to be able to provide maintenance and service history by component as opposed to just by jobsite.



What Parts Do We Add Components For?

Component records should be created as necessary for major components. This is a judgement call by companies regarding what is a major component. You could create a component record for every nut, screw and washer, but you do not want to do that. Most companies only do this for major components that have a serial #, warranty and typically something that you or your customers would want to track maintenance on or setup maintenance tasking records for.

Jobsite, Component and Maintenance Contract Relationships

You can see below how a jobsite must exist before you can add a component record because that component must reference a jobsite record. Maintenance contracts that also must link to a jobsite can be linked to a component record when that component is covered by that maintenance contract.

Building Your Component Database

Every company would like to have complete records of all major components at all their jobsites that they service. The challenge is gathering that information and entering it into Ascente. Components can be added and maintained in either Ascente Mobile Pro or Ascente:

- Ascente Mobile Pro software from the field by the technicians on their mobile devices when the technician is onsite installing or servicing a component.
- In the office in Ascente with the information that is gathered and provided by the technician or other source from either the:
 - Ascente: Jobsite Maintenance Program
 - Add the record using the Ascente / Service / Maintenance / Jobsite [Component] program.
 - Ascente: Work Order Entry Program
 - Add a component from the Ascente / Service / Transactions / Transactions / Work Orders program from the [Main] tab and by using the [F6] key from the 'Component' field.
 - The component selected will serve as the default component for all subsequent work order line records that are added.
 - Add a component from the Ascente / Service / Transactions / Transactions / Work Orders program from the [Detail] tab and by using the [F6] key from the 'Component' field.
 - Ascente: Inventory - Part Maintenance
 - You can setup an Ascente / Inventory / Maintenance / Part Maintenance program and setting the [Auto Add Component] flag so that when the part is invoiced, a new component record for the part and jobsite will be created when the work order is invoiced.

Adding Component Records

Ascente Mobile Pro

With Ascente Mobile Pro, from the field the technicians can see existing components for the jobsite or add new component records. They can also indicate the component(s) being serviced.

SO: 15-0024 TEXACO Office building

[Calls](#)
[Details](#)
[Jobsite](#)
[Investigation](#)
[Parts](#)
[Notes](#)
[Labor](#)
[Maint](#)
[Extra](#)
[Refrigerant](#)
[Review](#)

[Name/Address](#)
[Map](#)
[Components](#)
[Field Notes](#)
[Open Calls](#)
[Quotes](#)

Local Id

Active	Source	Local Id	Description	Manufacturer	Model	Serial No	Install Date
<input type="checkbox"/>	Server	AC-1	4-ton unit h-West corner	Carrier	8400	5338897A00213	11/15/99
<input type="checkbox"/>	Server	AC-2	4- unit North-west corner	Carrier	8400	AC060112316767	11/08/98
<input type="checkbox"/>	Server	AC-3	4-ton unit North-east corner	Carrier	8400	AC83948727772	11/08/98
<input type="checkbox"/>	Server	AC-4	4-ton unit South-east corner	Carrier	8400	AC738892716-112	11/08/98
<input type="checkbox"/>	Server	AC1	4 ton	Carrier	E50		09/01/03
<input type="checkbox"/>	Server	AC2	air handler				
<input checked="" type="checkbox"/>	Tech	AC3	3 Ton AC Unit	Carrier	CT3AC000000S	DR876777Q	
<input type="checkbox"/>	Server	Furn-1	Furnice - Basement	Thompson	BS-2303	TF3p987433	01/31/96
<input type="checkbox"/>	Server	pump					01/01/00
<input type="checkbox"/>	Server	RF01	Roof Unit 1	Trane	TN2.5	12093-120912-a	02/28/01
<input type="checkbox"/>	Server	serv	f				01/01/00

New components can be added here.

Figure 1: This is the form in Ascente Mobile Pro where the components can be added from the field.

Ascente: Jobsite Component File Maintenance

The component records in Ascente include the following information:

- General [Tab]
 - Description
 - Model #
 - Manufacturer
 - Serial #
 - Maintenance Contract #
 - Installation Date
 - Warranty Date
 - Refrigerant Requirements
 - Unit Capacity Details

The screenshot displays the 'Jobsite Maintenance' window with the 'Components' tab selected. The 'Jobsite' field is set to '1 Park Ave'. The 'Local Identifier' is 'A/C Unit'. The 'General' sub-tab is active, showing fields for Description ('4 Ton AC Unit'), Model ('40GF786'), Manufacturer ('Carrier'), Serial Number ('40GG6666S1'), Equipment ('Air Handler -Monthly'), Contract ('AC1'), Installation Date ('9/1/2016'), Warranty Date ('8/31/2018'), Extra Date, and EPA Required (checked). The 'User Defined' section includes Coverage Type ('Inspect Only'), Contractor ('Filters Excluded'), and Component Notes. The 'Refrigerant' section shows Refrigerant ('22'), Working Charge ('6.00'), and Unit of Measure ('Pound'). The 'Capacity' section shows Size ('4.00') and Unit of Measure ('Ton'). The status bar at the bottom indicates the record was created on 3/30/2016 and changed on 9/11/2017, with a timestamp of 9/19/2017 6:00 PM.

Figure 2: Ascente / Service / Maintenance / Jobsite [Component] tab

Ascente: Work Order

Component records can be added from the Ascente / Service / Transaction / Work Order program from either the [Main] or [Detail] tabs by using the [F6] function key from the component fields.

Inventory – Part Maintenance

The Inventory – Part records can be setup to automatically create a Jobsite Component record.

- **Auto Add Component:** Check this box if you want the system to automatically create a Jobsite Component record when you sell this part on a Work Order. The Jobsite Component record will be created when the Work Order is billed on a Prebill update. Note that this can be overridden on the Work Order.
- **Component Abbreviation:** This value will be used as the Component ID when a Jobsite Component is created from the Part. If a Component already exists with this value, a number will be appended to the end, starting with 1 and incrementing by 1 (ie, AC UNIT, AC UNIT1, AC UNIT2). This can be up to 10 characters. If left blank, the system will use the Component Abbreviation set up in Options & Interfaces (Inventory).

Part Maintenance

Part: ACC-050

General

Description: TON 13 SEER A/C CONDENSER ONLY

Additional Description: ACC-050-00300
Install Rheem Corsair 5 Ton 13 SEER A/C Condenser Only.

Part Type: Stocked

Part Status: Active

Product Line: Tasks

Unit of Measure: Each

Purchase Unit of Measure: Each

ABC Class:

Weight: 0.00 Spiff: 0.00

Mobile: ☒

Costs

Average	0.00
Standard	0.00
Last	0.00

Prices

Price 1	4,566.00
Price 2	4,109.00
Price 3	4,100.00
Price 4	0.00

User Defined Fields

User Field 1:

User Field 2:

User Field 3:

User Field 4:

Component

Auto Add Component: ☒

Equipment: (None)

Component Abbreviation: AC Unit

Picture

Picture:

Created: 3/13/2017 3:10:24 PM Changed: sa 3/13/2017 3:15:42 PM 9/19/2017 6:31 PM

Figure 3: Inventory / Maintenance / Part is used to maintain inventory part records and the 'Auto Add Component' field.

Operations

Component Service Tracking: Work Order or Detail Item Level

At what level of detail do you want to track component service sales, costs and history? In Ascente you can have either:

- One component assigned to a work order and have all the detail work order line(s) reference that one component.
- No component assigned to the work order, but every work order line can reference a different component.

Work Order Level

This level is almost always used and is recommended. It is assumed that the service provided is only for one component. All labor and material costs reference that one component.

Advantages

- Ease of operation and entry.
- Service History records will reference the component serviced.

Disadvantages

- If multiple major components are serviced, the history will only reference one component.
- You can create a separate service order for each component.

Service Order	Work Order	Work Order Component	Work Order Line	Part	Work Order Line Component	Qty	Cost	Sell
S1000	S1000	AC01	1	Labor	AC01	1	30	80
S1000	S1000	AC01	2	R22	AC01	5	200	400
S1000	S1000	AC01	3	Belt	AC01	1	8	18

Figure 4: Examples of assigning the component at the *Work Order Level*

Detail Item Level

This level assumes that you are servicing multiple components on one service order and the work order lines will not all reference the same component.

Advantages

- You do not have to create a separate service order for each component.

Disadvantages

- The service order history will reference one component, but multiple components were actual serviced.
- Operationally it is more work because every work order line will need to reference the correct component.
- While labor is posted in total for the service, it may need to be spread between multiple components and will not be correct without a lot of manual entries.

Service Order	Work Order	Work Order Component	Work Order Line	Part	Work Order Line Component	Qty	Cost	Sell
S1002	S1002		1	Labor	AC02	1	3	80
S1002	S1002		2	R22	AC03	5	20	400
S1002	S1002		3	Belt	AC04	1	8	18

Figure 5: Examples of tagging a work order and detail lines with component(s). Note the top has the same component

Recommendation

In almost all cases we recommend assigning components at the service order/work order level as opposed to the assigning multiple components on a single work order at the detail item level.

Ascente: Work Order [Main] tab

This is where you can enter the component for this work order when tracking components at the *work order level*. The component records in Ascente include the following information:

- General [Tab]
 - Component
 - Select an existing component record
 - Use the [F6] function key to add a new component record

The screenshot displays the 'Work Order Entry' window in the Ascente software. The 'Main' tab is active, showing a form for a work order. The 'Work Order' field is set to '77777', and the 'Service Order' is also '77777'. The technician is listed as 'Adam Anderson'. Both the 'Work Order Subtotal' and 'Invoice Subtotal' are '2,787.00'. The description of the work is 'Serviced A/C Unit and added freon'. The status is 'Open', the date is '8/14/2017', the technician is 'Billy B.', and the location is 'BillyB'. The component is set to 'A/C Unit'. There are buttons for 'Resolve Variance', 'Recalc Pricing', and 'Recalc Taxes'. The status bar at the bottom indicates the work order was created on 8/14/2017 and last changed on 9/14/2017.

Figure 6: Work Order [Main] tab is used to set the component default for this work order.

Ascente: Work Order [Detail] tab

This is where you can enter the component for each work order detail line. This is done when tracking components at the *detail item level*. The component records in Ascente include the following information:

- Detail [tab]
 - Component
 - From each work order detail line record, you can assign or remove a component that the work order line item referenced.
 - Use the [F6] function key to add a new component record

Work Order Entry

Work Order: 77777 Service Order: 77777 Adam Anderson
1 Park Ave

Work Order Subtotal: 2,787.00 Invoice Subtotal: 2,787.00

Main Service Order **Detail** Invoice Amounts

Resolve Variance Recalc Pricing Recalc Taxes

Part: ABS2000 Description: ABS 2 IN 90 Additional Description: []

Location: BillyB Bill Type: Material Tax Class: 1 Tax Component: A/C Unit Order Qty: 0.000 Bill Qty: 3.000 Backorder Qty: 0.000

Unit Cost: 2.00000 Extended Cost: 6.00 Unit Price: 5.000 Extended Price: 15.00

☐ Add Component Restock Date: []

Line	Part	Description	Location	Bill Type	Order Qty	Unit Price	Extended Price	Component	Purchase Dr
1	L	Mark Allman Date: 8/28/2	BillyB	Labor	0.000	150.000	150.00	A/C Unit	
2	ABS2000	ABS 2 IN 90	BillyB	Material	0.000	5.000	15.00	A/C Unit	
3	L	Labor	BillyB	Labor	0.000	150.000	900.00	A/C Unit	
4	ACC-020	2.0 TON 13 SEER A/C C	BillyB	FR Task	0.000	1,722.000	1,722.00	A/C Unit	
5	GSX130241	GSX13024 GOODMAN 2	BillyB	Material	0.000	0.000	0.00	A/C Unit	
6	R410A	FREON - R-410A	BillyB	Material	0.000	0.000	0.00	A/C Unit	
7	18935	PSCP24242 2x24x24 Cor	BillyB	FR Task	0.000	0.000	0.00	A/C Unit	
8	L	Labor	BillyB	Labor	0.000	0.000	0.00	COMP2	

F6 Maint 9/19/2017 6:12 PM

Figure 7: Work Order [Main] tab is used to set the component default.

Reports and Inquiries

Service Order History Inquiry

The Service Order History Inquiry can include the component code assigned to the work order.

Lookup																
Trouble	SO Status	Taxable	NonTaxable	Tax	Cost	Profit	Jobsite Name	Address	City	Region	Postal	Unit	Unit Desc	Total Prepaid	Work Date	Pro
Heating	Closed	0.00	0.00	0.00	63.00	-63.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802	AC1	AC Unit		4/25/2017	4/2
Maintenance	Closed	0.00	250.00	0.00	0.00	250.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802	AC1	AC Unit		3/1/2016	3/1
Maintenance	Closed	0.00	120.00	0.00	0.00	120.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802	AC1	AC Unit		1/1/2015	1/1
Maintenance	Closed	56.00	250.00	4.90	0.25	305.75	Austin Cox	123 Crab Tree	Salisbury	MD	21802	AC1	AC Unit	310.90	9/29/2015	9/1
	X-Cancel	0.00	0.00	0.00	0.00	0.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802					10/
Maintenance	Closed	100.00	1,335.00	8.75	525.09	909.91	Austin Cox	123 Crab Tree	Salisbury	MD	21802				3/10/2016	9/1
Air Conditioning	Closed	0.00	0.00	0.00	608.50	-608.50	Austin Cox	123 Crab Tree	Salisbury	MD	21802				3/20/2017	3/2
Air Conditioning	Closed	0.00	90.00	0.00	10.00	80.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802				6/24/2015	6/2
Heating	Closed	0.00	100.00	0.00	20.00	80.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802				9/1/2016	9/1
Heating	Closed	0.00	120.00	0.00	0.00	120.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802				10/1/2016	10/
Heating	Closed	0.00	100.00	0.00	0.00	100.00	Austin Cox	123 Crab Tree	Salisbury	MD	21802				10/1/2016	10/

Figure 8: Service Order History Inquiry. Note the component code included in the 'Unit' column.

Tasking Service Order

There is a 'Tasking Service Order' that can be printed that will reference the components being services for a maintenance service order.

12/20/11 11:48 am		Continental Products Unlimited				Page 1 of 2																							
		Maintenance Service Order				Service Order A1049M																							
Branch AT Atlanta Branch	Tech Robert Robert Arce	Labor Grade J		Purchase Order																									
Zone LA001	Department Air Conditioning	Maintenance Contract AC																											
Jobsite Name TEXACO Address 123 Main St Suite 120 BELLFLOWER 90706	Cust Id Son009 SonicView Systems Inc. 4619 Harvard St.	Status Open		Maintenance Date 10/1/2004 12:00:00AM																									
CA USA	Minneapolis MN USA	Promise Date 10/7/2004		Prom Time Anytime																									
Phone Primary (714) 222-3333 123 Dave Mobile (562) 654-6456 Bonnie	Primary (612) 375-812	Priority Hot		Est Hours 1.00																									
		Scheduled: 06/30/2010 Exactly 8:30 am																											
AC1		AC Condensor		Serial Number 123412341234																									
Local ID AC1		Model T123-55X		Instal Date 1/1/2009																									
Manufacturer Trane		Equipment Air Compressor Air Compressor		Warranty Date 12/31/2004																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Task</th> <th>Task Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 91.00</td> <td>AIR COMPRESSORS/GENERAL</td> </tr> <tr> <td><input type="checkbox"/> 91.01</td> <td>....Check & tighten connections</td> </tr> <tr> <td><input type="checkbox"/> 91.02</td> <td>....Check all contactors</td> </tr> <tr> <td><input type="checkbox"/> 91.03</td> <td>....Check & record voltage</td> </tr> <tr> <td><input type="checkbox"/> 91.04</td> <td>....Check belts</td> </tr> <tr> <td><input type="checkbox"/> 91.05</td> <td>....Check oil level & charge as needed</td> </tr> <tr> <td><input type="checkbox"/> 91.06</td> <td>....Check for any leaks</td> </tr> <tr> <td><input type="checkbox"/> 91.07</td> <td>....Check filters & replace as needed</td> </tr> <tr> <td><input type="checkbox"/> 91.08</td> <td>....Blow down manual/auto drain</td> </tr> <tr> <td><input type="checkbox"/> 91.09</td> <td>....Check operation of controls</td> </tr> </tbody> </table>								Task	Task Description	<input type="checkbox"/> 91.00	AIR COMPRESSORS/GENERAL	<input type="checkbox"/> 91.01Check & tighten connections	<input type="checkbox"/> 91.02Check all contactors	<input type="checkbox"/> 91.03Check & record voltage	<input type="checkbox"/> 91.04Check belts	<input type="checkbox"/> 91.05Check oil level & charge as needed	<input type="checkbox"/> 91.06Check for any leaks	<input type="checkbox"/> 91.07Check filters & replace as needed	<input type="checkbox"/> 91.08Blow down manual/auto drain	<input type="checkbox"/> 91.09Check operation of controls
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<input type="checkbox"/> 91.05Check oil level & charge as needed																												
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<input type="checkbox"/> 91.07Check filters & replace as needed																												
<input type="checkbox"/> 91.08Blow down manual/auto drain																												
<input type="checkbox"/> 91.09Check operation of controls																												

Figure 9: Tasking Service Order: Ascente / Service / Reports / Service Order Print [Tasking Service order]

Component Listing

The Component Listing Report can be run to list component records based on many different combinations of runtime criteria. Examples of uses are:

- List components by an install date or warranty date range for marketing.
- List all components by a manufacturer for warranty tracking purposes.
- Listing all installations of a specific modem #.

The screenshot shows the 'Maintenance Contracts' window with the 'Component Listing' report selected. The 'Range Selection' table lists various fields with 'Beginning' and 'Ending' date ranges. The 'Field Selections' section shows 'Component Listing' as the selected report name. The 'Options' section includes a checkbox for 'Print Options Cover Page'. The status bar at the bottom right displays the date '9/22/2017' and time '5:15 PM'.

	Beginning	Ending
Jobsite	(Beginning)	(Ending)
Local Identifier	(Beginning)	(Ending)
Manufacturer	(Beginning)	(Ending)
Model	(Beginning)	(Ending)
Serial Number	(Beginning)	(Ending)
Install Date	(Beginning)	(Ending)
Warranty Date	(Beginning)	(Ending)
Extra Date	(Beginning)	(Ending)
Contract	(Beginning)	(Ending)
Equipment	(Beginning)	(Ending)

Field Selections
Report Name: **Component Listing**

Options
☐ Print Options Cover Page

9/22/2017 5:15 PM

Figure 10: The Ascente / Service / Reports / Maintenance Contracts / Component Listing – Runtime Options

09/22/17
5:13 pm

Test Company On New Server
Components by Jobsite

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Local Identifier	Model	Manufacturer	Serial Number	Contract	Working Chrg	EPA		
Install Date	Warr Date	Exp Extra Date	User Defined Fld #1	User Defined Fld #2	Refrigerant	Equipment	W.C.U.O.M.	Req'd
T4		<input checked="" type="checkbox"/>					.00	
VAV2	344556h	Carrier	P44554A2	AC			.00	
1/01/00	1/01/00	1/01/00		Automation System				
WH40S1	WH40						.00	
12/10/15		12/28/16						
Records: 15								
Jobsite: 123 Main St SMITH, JOE 123 MAIN ST FOOTHILL RANCH, CA 92610		Cust: Jerick JERICK ENTERPRISES 4566 INTERNATIONAL PARKWAY FOOTHILL RANCH, CA 92610						
COMP1	test part					Air Compressor	.00	
4/02/14		12/28/16						
CprElbow1	CE90					100F	.00	
4/03/14		12/28/16						
Records: 2								
Jobsite: 2580 Technology Blvd DACULA BUSINESS TOWERS 2580 TECHNOLOGY BLVD UNIT 3B DACULA, GA 30019		Cust: TutorTime TUTOR TIME 62 VALLEY BLVD DACULA, CA 98453						
CprElbow1	CE90					Air Compressor	.00	
3/05/15		12/28/16						
GWH1	T1000					Gas Water Heater	.00	
3/05/15		12/28/16						
WH40S1	WH40Smith						.00	
3/05/15		12/28/16						
Records: 3								
Jobsite: 26 Castways North FISHER, DEBRA 26 CASTWAYS NORTH NEWPORT BEACH, CA 92660		Cust: fish26 FISHER, DEBRA 26 CASTWAYS NORTH NEWPORT BEACH, CA 92660						
AC1	654654444	Trane	SSQ654654654			York Chiller	12.00	Pound
1/01/00	12/31/05	12/28/16	Full Coverage		R22			
Records: 1								
Jobsite: 3005 Breckenridge Blvd COMPUSOURCE EAST 3005 BRECKENRIDGE BLVD SUITE 250 DULUTH, GA 30096		Cust: (Cash) DEFAULT CASH CUSTOMER DULUTH,						
AC 1	COND20011	Seer2	342SDX2S113				.00	

tmpsa9221717135MaintComponentList.rpt

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Figure 11: The Ascente / Service / Reports / Maintenance Contracts / Component Listing Report

Final Recommendations

- You may want to consider using components if you work in the HVAC and particularly if you have commercial maintenance contracts on major components.
- Would history by component be valuable to you or your customers?
- You may also want to consider looking at the Ascente – Tasking module for creating predetermined maintenance schedules unique to each component.
- Ascente Mobile Pro will make it easier to build your component records for your jobsites because the technician can do this from the field as opposed to capturing the information and then having the office enter the component records later.