

Service Types

Wed, Jan 17, 2024 [Equipment and Services](#)

Service Types are to represent the Services that are performed under the related Work Order/Sub Work Order Type. Sub Service Types are used to represent the classification/type of the Service Type. For example: the Service Type could be Spillage where the Sub Service Types could be Biological and Chemical.

1. The first step is to select the Client that will be used. For information on how to do this, see the [Client Selection](#) page.

2. This is the “Equipment/Service Types” screen. A list of all the items against the selected Client is shown. It is possible to tick and un-tick Equipment/Service Types to determine whether it can used throughout the system. A summary of the selected item is displayed on the right.

The screenshot shows a software interface titled "Demo Commercial Equipment/Service Types". It is divided into two main sections: "Equipment/Service Types" on the left and "Service Details" on the right. The left section contains a tree view of categories under "CLEANING", with "Ad Hoc" selected and "Exterior Service Clean" highlighted. The right section displays details for "Exterior Service Clean", including its name, description, and a summary that states "Is Supported?: Yes". It also lists "Work Order Types" (Non-Operational Work Order, Operational Work Order, PPM, Quote), "Reasons" (Recommendation du Client, Recommendation from Contractor), and "Keywords" (clean). At the bottom right, there are "Save" and "Cancel" buttons.

3. Click on “Add” to add an Equipment/Service Type. Choose whether to add an “Equipment Type” or a “Service Type” under the currently selected WO type. If an Equipment or Service is currently selected then the options to add either “Sub Equipment” or “Sub Service” will appear.

The screenshot shows a dropdown menu with four options: "Sub Equipment under 'Bakery Oven'", "Equipment under 'Bakery Ovens'", "Service under 'Bakery Ovens'", and "Work Order Type".

4. This is the Add Service Type screen that appears after choosing to add an Service Type. Each of the fields require different pieces of information to be entered. The fields are explained below:

Name is a freeform field to enter the name of the Service Type.

Description is a freeform field to enter a description of the Service Type.

Cost Code is a freeform field to enter the Cost Code this Service Type will be associated with. This and the Sub Cost Code field are permission based.

Sub Cost Code is a freeform field to enter the Sub Cost Code this Service Type will be associated with. This and the Cost Code field are permission based.

Is Supported? is a tick box. If this box is un-ticked then the User is stating that this item is not supported and that a Non-Supported Reason needs to be given. This is so that if a WO is logged against this type, whoever is logging it is told that WOs cannot be raised against this type and that they must raise it in a different manner, such as contacting their IT department. These details go in the Non-Supported Reason.

Non-Supported Reason is a freeform field. This is where the reason why the Service type isn't supported is entered.

Revenue Only? is a tick box to determine whether the Service Type can have a Capital Project Budget Code associated to a Work Order. If a Service Type is marked as Revenue Only then Work Orders with this Service Type cannot be capitalised.

Work Order Types is a pop up screen where the Work Order Types, that the Service Type will be associated with, are chosen.

Certificates is a pop up screen. This is where the Certificates that relate to the Service Type are chosen.

Reasons is a pop up screen. The Reasons as to why the issue occurred are chosen in this screen.

Symptoms is a pop up screen where the Symptoms (ways to describe the issue) for the

Service Type are selected.

Part Types Part Types only apply to Equipment items, not Service items, so this field is not editable.

Keywords is a freeform field. Entering Keywords enables the Service Type to appear in a search if the specific Keywords are searched for.

5. Once all the necessary information has been entered, click the "Save" button. The new Service Type will be shown in list under the chosen Sub Work Order Type.

Note: When creating a Sub type, only the Name, Description, Cost Codes, Symptoms and Keywords can be modified. Everything is inherited from the parent type.

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