Studio360
powered by
Smartware Studio™

Service Estimating
User's Guide

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# Table of Contents

1. **Introduction / About This Guide** .................................................................... 5
   - Installing and Administering Smartware Studio ........................................... 5
   - To Learn More about Smartware Studio ..................................................... 5
   - To Contact Us ............................................................................................... 5

2. **Overview of Service Estimating** ................................................................. 7
   - Equipment ................................................................................................. 7
   - Tasks .......................................................................................................... 8
   - Task Types ............................................................................................... 9
   - Task Levels ............................................................................................... 9
   - Task Sets .................................................................................................. 9

3. **Managing Equipment in the Parts Database** .............................................. 11
   - Before You Begin ..................................................................................... 11
   - Importing a List of Equipment and Tasks .................................................. 11
     - Step 1: Prepare the Equipment and Task Import Spreadsheet ................. 13
     - Step 2: Load the Equipment and/or Tasks from the Spreadsheet .......... 14
     - Step 3: Preview the Imported Data ....................................................... 15
     - Step 4: Import/Update the Data ............................................................ 16
   - Adding and Editing Individual Equipment and Tasks .................................. 17
     - Editing a Piece of Equipment ................................................................. 18
   - Updating Equipment and Tasks in Bulk ..................................................... 18
     - Exporting Existing Equipment and Tasks ............................................. 19
     - Updating the Data .................................................................................. 20
   - Adding and Editing Task Sets .................................................................. 20

4. **Creating a Service Estimate** ........................................................................ 21
   - Creating a New Service Estimate ............................................................... 21
   - The Service Equipment Tab ..................................................................... 21
     - Adding Equipment to the Equipment List ............................................. 22
     - Selecting Equipment to Add ................................................................. 22
     - Tasks ..................................................................................................... 23
     - Visits ..................................................................................................... 23
     - Labor and Labor Codes ....................................................................... 23
     - Repair Costs ......................................................................................... 25
     - Total Costs ............................................................................................ 25
     - Selecting Task Levels .......................................................................... 26
   - The Estimate Node Tabs ........................................................................... 27
     - The Estimate Overview Tab ................................................................ 27
     - Estimate Settings ................................................................................. 28
     - The Estimate Service Equipment Tab ..................................................... 28
5. **Generating Reports, Contracts and Task Sheets** .......................................................... 29

Reports ........................................................................................................................................ 29
Service Contracts ......................................................................................................................... 29
  *Service Contract Documents* .................................................................................................... 30
  *Multi-Year Settings* .................................................................................................................. 30
Task Sheets .................................................................................................................................... 31
  *Customizing Task Sheets* ......................................................................................................... 32
  *Task Sheet Rules* ...................................................................................................................... 33
1. Introduction / About This Guide

This Guide will describe the features and functionality of Smartware Studio that relate to Service Estimating using the Estimating Module.

Installing and Administering Smartware Studio

For complete details on how to install, setup and configure Smartware Studio refer to the separate documents (available from the HELP menu):

- Smartware Studio Setup and Administration Guide. including:
  - The Parts Database Manager
- Smartware Studio Estimating Module User’s Guide

To Learn More about Smartware Studio

Many of the topics covered in this Guide are better illustrated through visual examples. To that end, our video training sessions are available for viewing and downloading from our web site. We encourage you to use these videos as part of your training.

This guide also assumes a familiarity with the basic concepts of Smartware Studio. For more information about using Smartware Studio projects, refer to the separate Smartware Studio User's Guide.

To Contact Us

Our technical support team is available weekdays from 8 am to 5 pm Eastern time at (716) 213-2222. You may also visit our web site at www.smartwaretech.com or e-mail us at techsupport@smartwaretech.com.
2. Overview of Service Estimating

A Service Estimate in Studio is a variation of the standard Project Estimate, except that instead of building a tree of areas and systems that contain Parts, Points and Labor, the Service Estimate contains areas and systems with pieces of Service Equipment, each of which has an associated list of maintenance Tasks that need to be performed on it.

- As you add equipment, the costs associated with executing those tasks (labor and material) are added to the Estimate to calculate the cost.
- The other expenses and features of the Estimate Module – such as Taxes, Warranties, Bonds, Escalation Costs, and Global Labor Adjustments – all function the same as they do in Project Estimates.

Once a Service Estimate is complete, not only can you run the standard array of customizable Estimate Reports, you can also create Task Sheets and Service Contract documents.

Equipment

A piece of equipment in the Estimate, and in the Parts Database, represents a unit of machinery that requires regular maintenance. It can be a single piece of equipment or a system made up of multiple parts.

- Once added to the Parts Database, a piece of equipment gets a unique Equipment ID (EqUID) number.

The Equipment is organized using three categories Category, Sub-Category and Size/Model (referred to in the Parts Database as CategoryA, CategoryB and CategoryC. Examples would include:

<table>
<thead>
<tr>
<th>Category (Category A)</th>
<th>Sub-Category (Category B)</th>
<th>Size/Model (Category C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAS</td>
<td>VAV</td>
<td>3 HP and less</td>
</tr>
<tr>
<td>BAS</td>
<td>Boiler</td>
<td>5-10 HP</td>
</tr>
<tr>
<td>HVAC</td>
<td>AHU</td>
<td>0 HP and more</td>
</tr>
<tr>
<td>HVAC</td>
<td>AHU</td>
<td>5-10 HP</td>
</tr>
</tbody>
</table>
• When you add equipment to the Parts Database, you can use any values for these category fields that you want.
• The Category values of BAS, HVAC, Security and Fire do have additional features (e.g. Repair Frequency), so are recommended.

The other fields associated with a piece of equipment are:

• Repair Frequency (percent of years, as in 20% = expected once every 5 years)
• Repair Cost (per repair)
• Repair Labor Hours (per repair)

• Introductory Paragraph (for Task Sheets)
• Task List

The Repair Frequency value is not stored in the database, but can be specified on a case by case basis as equipment is added to the estimate. There is a pre-defined list of Categories (BAS, HVAC, Security and Fire) for which you can specify the Default Repair Frequency in the Service Estimate Settings (or the Service Equipment tab of the Estimate Settings).

Tasks

For each piece of equipment in the estimate or Parts Database, there is a list of one or more tasks that need to be performed on a regular basis. A few examples:

<table>
<thead>
<tr>
<th>Task</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backup database</td>
<td>Software Verify</td>
</tr>
<tr>
<td>Check fan operation</td>
<td>Physical Verify</td>
</tr>
<tr>
<td>Check mounting to ensure device is secure</td>
<td>Physical Verify</td>
</tr>
<tr>
<td>Check motor amperage</td>
<td>Calibrate</td>
</tr>
</tbody>
</table>

The tasks also include fields for:

• Task Labor Hours
• Task Material Cost
• Task Subcontract Cost
• Task Group (used to organize equipment with a large number of tasks)
• Task In Level 1, 2, 3
**Task Types**

The Task Types are used to organize tasks together into tables when generating Task Sheet documents. The possible values are:

<table>
<thead>
<tr>
<th>Task Type</th>
<th>Value in the Task Import/Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Verify</td>
<td>SoftwareVerify</td>
</tr>
<tr>
<td>Physical Verify</td>
<td>PhysicalVerify</td>
</tr>
<tr>
<td>Measure/Calibrate</td>
<td>Calibrate</td>
</tr>
<tr>
<td>Notify</td>
<td>Notify</td>
</tr>
<tr>
<td>Record</td>
<td>Record</td>
</tr>
<tr>
<td>Replace</td>
<td>Replace</td>
</tr>
<tr>
<td>Enable/Disable</td>
<td>EnableDisable</td>
</tr>
<tr>
<td>Validate</td>
<td>Validate</td>
</tr>
<tr>
<td>Training</td>
<td>Training</td>
</tr>
</tbody>
</table>

**Task Levels**

There are 3 levels of service that can be associated with each task.

- Typically the tasks would be grouped such that the basic tasks are associated with all 3 levels, the intermediate tasks are associated with Levels 2 and 3, and the extended tasks are only associated with Level 3. These associations can be made in the Parts Database.
- When creating an estimate, the estimator can change a piece of equipment, a system or an entire estimate to be **Level 1**, **Level 2** or **Level 3**. By doing so, it automatically includes or excludes the appropriate tasks, adjusting the costs accordingly.

**Task Sets**

Tasks are always grouped together into Task Sets, and each piece of equipment makes reference to a single Task Set.

- The purpose for this is so that multiple pieces of similar equipment (such as AHUs of differing size) can share the same Task Set. If a task is added to the Task Set, it is implicitly added to all the pieces of equipment that use that Task Set.
- There is no problem if each piece of equipment has a unique Task Set, essentially creating a one-to-one association.

In the Parts Database a Task Set has a name and a unique **Task Set ID (TaskSetUID)** number.
3. Managing Equipment in the Parts Database

While you could add each piece of equipment and their tasks to a Service Estimate one by one, that would be very time consuming. Instead, you will want to add your equipment and their tasks to the Studio Parts Database.

- The normally downloaded and synchronized Parts Database does not contain any Equipment or Tasks that are maintained by Smartware.
- Smartware will, however, distribute a pro-forma list of equipment and tasks that you can import into your database. The importable list will be provided by Schneider Electric, but the equipment will not include any repair costs or task hours. You will need to fill these in with your estimated costs before importing the data, as described in this chapter.
- There is also a blank template (with just a couple of sample records) that you can use to import your own completely custom list of equipment and tasks.

Before You Begin

The importing will need to be done by someone familiar with Microsoft Excel and who has permissions to edit the Parts Database Manager.

- Refer to the chapter The Parts Database Manager in the Smartware Studio Setup and Administration Guide for more detail.

You will also want to make sure Studio is up to date:

- If necessary, download and install the latest version of Smartware Studio / Studio360.
- From the Parts Database Dashboard, be sure to push the button to SYNCHRONIZE YOUR COMPANY’S DATABASE WITH SMARTWARE’S.

Importing a List of Equipment and Tasks

To begin, open the Parts Database and open the Service Equipment Import tool:

- From Studio, select TOOLS ➔ PARTS DATABASE
- From the Parts Database form, select DATA TABLES ➔ SERVICE EQUIPMENT. This will open the Service Equipment form.
The *Service Equipment* form will show a list of the Equipment after you’ve imported it. For now, click the IMPORT AND UPDATE button at the bottom:

![Import and Update Equipment and Tasks](image)

The *Import and Update Equipment and Tasks* tool can handle a number of different scenarios:

- The steps that follow will walk you through the Import process. Later sections discuss the Export and Update features.

![Database Manager - Import and Update Equipment and Tasks](image)
Step 1: Prepare the Equipment and Task Import Spreadsheet

To start, you will need an Excel spreadsheet with the worksheets and column names set up for importing. Click the GET TEMPLATE OF EQUIPMENT AND TASKS button:

You will be given a choice of any template files that are available. Each contains two worksheets, Equipment and Tasks, with the appropriate column headers.

- The “Equipment and Tasks (Sample)” template is mostly blank, allowing you to fill in your own equipment and tasks.
- The “Equipment and Tasks (SE Version 1)” template, when available, will contain a list of Equipment and Tasks provided by Schneider Electric for partners to use and customize. As noted earlier, the equipment will not include any repair costs or task hours, and you will need to fill these in with your estimated costs before importing the data.

Select one from the Template Name list and give it a new name (e.g., “My Equipment”). Click the OK button and a copy of the template will be created, stored in the Equipment Import folder, and automatically opened in Excel.

- The Equipment Import folder is located on your local machine in your Application Data folder. You can open it in Windows Explorer at any time by clicking the OPEN EQUIPMENT IMPORT FOLDER BUTTON.
Once created, you will need to fill in or transfer data into this spreadsheet. This is the biggest effort associated with getting your organization up and running with the Service Module. The individual fields in the Equipment and Task rows were described in the previous chapter. A few key points to note are:

- When importing Equipment and Tasks, the tasks are implicitly linked to the Equipment through the TaskSetName field. For tasks to be associated with a piece of equipment, they will need to have the same TaskSetName value.
  - If TaskSetName is omitted in Equipment worksheet, it will create a default one using the values for CategoryA, CategoryB and CategoryC (e.g., “BAS - AHU” or “HVAC - Boiler - 40 HP”)
  - If TaskSetName is omitted from the Tasks worksheet, it will look for values for CategoryA, CategoryB and CategoryC to create a default TaskSetName also, but these columns would need to be added to the worksheet manually.

- If you have more than one piece of equipment that uses the exact same list of tasks, you can use the same TaskSetName in each of the rows on the Equipment worksheet, and then only include the tasks in the Task Set once on the Tasks worksheet.

**Step 2: Load the Equipment and/or Tasks from the Spreadsheet**
Once you have your spreadsheet filled in, use the Browse button in Step 2 to select the file. It will look in the Equipment Import folder by default.

- Once selected, the data in the spreadsheet will be loaded automatically and the available options in Step 3 will be highlighted.
- If you have the spreadsheet open and save changes, you can reload the updated data by clicking the LOAD DATA button.
Step 3: Preview the Imported Data

Depending on the worksheets and the data in the spreadsheet, you will have the option to import new or update existing Equipment and/or Tasks.

In this case, you will want to Import New Equipment and Tasks. Select the last option and click PREVIEW DATA to validate and view the imported data.

- All the Imported rows should show with a Status of **New** (in blue). If there are any errors, the Status would be **Error** (in yellow) and an error message would appear in the last column.
- Be sure to review both the Equipment and Tasks tabs.
• The TaskSetName values in blue indicate that there is not yet a Task Set with that name, and that it will be created automatically.

**Step 4: Import/Update the Data**
The last step shows you the number of records and errors found for both Equipment and Tasks. When the previewed data looks correct and there are no errors, you can import the data into the database by clicking the IMPORT button.

• You will need to publish the Parts Database to yourself (for testing) or all users (for distribution) to see these records in the Service Estimating module. Use the FILE ➔ DASHBOARD menu command to bring up the dashboard to publish.

• You can edit the data after it has been imported, either individually or in bulk, as described in the following sections.
Adding and Editing Individual Equipment and Tasks

Once you have Equipment and Tasks in your database, you can browse and edit them through the DATA TABLES ➔ SERVICE EQUIPMENT form.

- Use the ADD, EDIT, DELETE and DUPLICATE buttons to add and edit individual equipment records.
- You can double-click an equipment record to edit it as well.
Editing a Piece of Equipment
When you edit a piece of equipment, you can edit the values of the fields and select a Task Set to associate with the equipment.

- You can edit the associated Task Set by clicking EDIT THIS TASK SET. Any changes to the Task Set will be reflected in all equipment that uses that Task Set.

Updating Equipment and Tasks in Bulk
After the initial import, you may find that you want to update values in multiple pieces of equipment or tasks at the same time (e.g., you might want to increase the Repair Cost by a fixed percent for all equipment). For updating you use the same Import and Update tool used to import the data earlier in this chapter.
To open the Import and Update tool:

- From the Parts Database, select Data Tables → Service Equipment
- Click the Import and Update button at the bottom of the form.

The procedure is similar to the initial import, except you will start by exporting your existing data into a new Excel workbook, edit the data in those spreadsheets, and then select one of the Update options.

**Exporting Existing Equipment and Tasks**

In Step 1, click the EXPORT EXISTING EQUIPMENT AND TASKS button to bring up the Export Equipment and Tasks form.

Select the appropriate option and click Export. A new spreadsheet will be saved in the Equipment Import folder and opened in Excel.

- When exported, the Existing Equipment has a column called *EqUID* which uniquely identifies the record. If you leave this column in, you can change the values of *CategoryA*, *CategoryB* and *CategoryC*.
- Likewise, exported Tasks have a *TaskUID* column used to match records during update.

Make all your changes in this spreadsheet. You can remove any columns you do not want to update.
Updating the Data
Once the edits have been made in the spreadsheet, the steps are essentially the same as the import.

- In Step 2, click BROWSE and select the workbook with the updated data.
- In Step 3, select the action (either Update Existing Equipment or Update Existing Tasks).
  - If you made changes to both, you will need to do them in two separate updates (e.g. Update the Equipment, then use the same workbook to update the Tasks).
- Click PREVIEW DATA to validate and review the changes.
  - Changed values will be noted in Green. Errors will be noted in yellow.
- When all data looks correct, click UPDATE to apply the changes to the database.
- Be sure to Publish the database (FILE→DASHBOARD) to distribute the changed data to the users.

Adding and Editing Task Sets
As a shortcut, you can browse and edit the Task Sets (outside of their association with a piece of equipment), by selecting DATA TABLES→SERVICE EQUIPMENT TASK SETS.

- This is the same form as when you are editing a piece of equipment and click MANAGE ALL TASK SETS.
4. Creating a Service Estimate

Note: Refer to the separate Estimate Module User’s Guide for full information on creating Estimate projects and working with Estimates. This chapter assumes you are familiar with those topics, and emphasizes only how Service Estimate projects differ.

Creating a New Service Estimate
You create a Service Estimate in the same manner as a regular (Project) Estimate.

- Select FILE→NEW PROJECT and select the Service Estimate project type; or
- In an existing Customer Site project, right-click on a folder and Select ADD→ESTIMATING→SERVICE ESTIMATE.

As with regular Estimates, you add Area and System nodes to represent the structure of the customer’s equipment. The names and organization of the Areas and Systems is entirely up to the estimator.

The Service Equipment Tab
Whereas the System nodes in a regular Estimate have tabs for Parts and Points, a Service Estimate’s systems have a tab for Service Equipment.
There are three grids of information on the tab:

- The upper grid shows a list of equipment for this system (the Equipment List).
- As you add or select a piece of equipment in the Equipment List, the other two grids will show a list of the Tasks and Visits associated with that piece of equipment.

Adding Equipment to the Equipment List

You can add a piece of equipment to the Equipment List in two ways:

- Click the **Select Equipment** button to view a list of all the equipment in your Parts Database. These pieces of equipment should already have lists of tasks and other properties, such as repair costs.
- Click the **Add Custom Equipment** button to add a blank row to fill in manually.
- Once added, you can edit the values for the equipment by clicking in the cells and typing.

Selecting Equipment to Add

When you click Select Equipment the Equipment Selector will be displayed:

- You can filter by Category and Sub-Category.
When you select a piece of equipment, the associated task list is displayed.

You can double-click the piece of equipment, or select it and click the ADD button to add it to the current system.

There are additional options in the lower left of the Selector.

Tasks
When you select a piece of equipment, the Task list is loaded with the associated tasks.

- You can edit the values in the tasks by clicking in the appropriate cells.
- You can turn off individual tasks without deleting them (so they can be turned back on) by unchecking the Include box in the task row.

Each task defaults to 1 Visit Per Year. If you change that value, the cost (in labor hours and material) will be multiplied by the number of visits.

Visits
Tasks are implicitly grouped together into sets associated with a Visit. A Visit is made up of all the included tasks that have the same Visits Per Year value (e.g., all once a year tasks are a visit, all twice a year tasks are a separate visit, etc.).

- The list of Visits changes automatically as you change the values in the Task list
- For each visit you assign the Labor Code and whether the time is Overtime (refer to the next subsection on Labor Codes).

You can also force it to create separate Visits based on your own criteria by filling in the Visit Code. Two tasks with the same Visits Per Year value but different Visit Code values become separate visits.

- This is generally used to assign different tasks to different Labor Codes and/or Overtime.

Labor and Labor Codes
Labor costs are calculated for two elements of the Service Equipment:

- Hours associated with executing the Tasks
- Hours associated with potential Repairs
These hours can be associated with different Labor Codes, and can indicate Overtime (instead of Regular hours):

- For Tasks, you assign the Labor Code with the Visit, as described in the previous section.
- For Repairs, you can assign the labor code for each piece of equipment separately in the Repair Labor Code column.

There is a default Labor Code that is automatically associated with Tasks and Repairs, and you can override it at two levels.

- You can specify the default Labor Codes for the entire Estimate on the Overview tab of the Estimate node.
- You can override the Estimate’s default and specify a different default for all the Equipment on a System node by selecting the options at the top of the Service Estimating tab:

![Image of Labor Code selection]

- Finally, you can override the values for individual Equipment repair or Task Labor as described earlier.

Note that for the System Labor Code list, there is a choice for Default, in addition to all the labor codes. In the above example, Default (CTS) is separate from CTS. Selecting Default (CTS) implies that this code is actually the one from the Estimate, and will change if that one changes. Selecting CTS indicates to use CTS, regardless of the Estimate’s setting.

- The same logic applies when overriding the System’s Labor Codes in an Equipment or Visit record.
**Repair Costs**

Repair Costs are based on the expected *Repair Frequency* – the percent chance that the repair costs (Labor, Material and Subcontract) will be incurred that year.

- A piece of equipment with a Repair Frequency of 20% is assumed to need to be repaired one out of every five years.
- All repair costs are multiplied by the Repair Frequency to calculate the estimated repair cost for each year of the contract.
- You can set the default Repair Frequency for certain categories of Equipment in the ESTIMATE SETTINGS form on the *Service Equipment* tab.

Some contracts do not include repair, or you may need to quote the contract with or without repair, maybe even for different systems or buildings. You can control which pieces of equipment have their Repair costs included at several levels:

- On the *Overview* tab of the Estimate node, you can set INCLUDE REPAIR COSTS IN CONTRACT, and if so, whether to INCLUDE REPAIR MATERIAL COSTS IN CONTRACT (as opposed to just the Labor and Subcontract).
- On the Area and System level, you can choose whether to INCLUDE REPAIR and INCLUDE REPAIR MATERIAL.
  - Your choices here are:
    - *Default* – uses the value set in the Estimate or parent Area, and change the value if the value in the Estimate or parent Area changes
    - *Yes, No* – sets the default for the System to Yes or No, ignoring the value in the Estimate or parent Area
    - *Custom* – allow you to choose whether to include Repair costs for each piece of equipment separately by checking the INCLUDE REPAIR checkbox.
- If the System’s INCLUDE REPAIR is set to *Custom*, you can set the INCLUDE REPAIR for each piece of equipment

**Total Costs**

The calculated costs are totaled and shown in two locations on the Service Equipment tab:

- The total costs for the Tasks for the selected piece of equipment is shown in the lower-right corner.
- The total costs for Tasks and Repairs for all the entire system is shown in the upper-right corner.
Selecting Task Levels

In the Parts Database, it is possible to assign a Task to one or more of three Levels (Level 1, Level 2, and Level 3).

- These are intended to represent different levels of service (e.g., Basic, Advanced, and Deluxe)
- It would be expected that some tasks are Level 3 only, some are Level 2 and 3 and others are included at all levels. However, this is not strictly enforced so tasks can be associated with any combination of levels.

If the Level data is specified, you can use the Set Level button to cause tasks to be marked as Included or not Included based on which levels they are in.

In the top section, you can select the specific level. There are also a few other options that handle cases that may be useful:

- In the lower section, you can explicitly set the Number of Visits value for each of the tasks in a specific Level.
• The Set Level tool is also available at the Area level, and at the Estimate level (on the Estimate’s Overview tab). Setting the level affects the current node and all the nodes below it.

If you manually change the Include status of one or more tasks, the Level indicator will show variations like Level 1+ (all of Level 1 plus a few additional tasks), Level 2- (all of Level 2, except a few tasks) or Custom (not closely corresponding to any level).

**The Estimate Node Tabs**
A Service Estimate contains some variations of the tabs available when you select the root Estimate node.

**The Estimate Overview Tab**
There are a few additional options of the Overview tab:

• Most of these settings were discussed in earlier sections of this chapter.
• The *Facilities* list is displayed in some of the Service Contract documents, and is not used anywhere else in the estimate to calculate any costs.
**Estimate Settings**

The Estimate Settings button here (and the Service Equipment Settings button on the Area and System) provide access to a few extra settings:

![Service Estimate Settings](image)

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**The Estimate Service Equipment Tab**

On the Estimate node, the Service Equipment tab shows the total of all the Service Equipment in the Estimate.
5. Generating Reports, Contracts and Task Sheets

Once you have entered the equipment and settings in your Estimate, you can generate reports and documents to provide to your customers and internal use.

Reports
As with other estimate, you can run a large number of reports from the Reports tab.

- Reports specific to a Service Estimate include:
  - Service Equipment and Tasks
  - Service Equipment List (by System)
  - Service Equipment List for Customer
- These reports can be customized by copying one of the standard reports and modifying the copy. Refer to the Estimate Module User’s Guide for more detail on using and creating custom reports.

Service Contracts
A Service Estimate has a new tab, Service Contract:
**Service Contract Documents**
To generate a Microsoft Word or PDF version of a Service Contract document, select the document in the list and click GENERATE DOCUMENTS.

- You have the option to create PDFs or send the documents directly to the printer.
- PDF Generation requires some additional setup. Refer to the Estimate Module User’s Guide or the Setup and Administration Guide.

You can customize the included Service Contract documents to include your company logo and whatever text you need.

- The Service Contract documents are stored on the workstation in the Application Data folder’s Reports/Service Contracts sub folder.
  - Go to TOOLS®OPTIONS®LOCAL FILES and click the Application Data link to open that folder.
- You will want to copy one of the documents to a new file name and edit that version.
  - If you edit the included version, your changes will be overwritten with the next Studio update.
- As with other custom reports, custom service contracts can be distributed from your company’s server to all your users.

**Multi-Year Settings**
For multi-year contracts, you can include the number of years and the annual increase to generate a table of future year costs. This table can be inserted into the contract document.

- **Note:** The calculated costs in the Estimate are for the *first year only.*
Task Sheets
A Task Sheet is a customer-friendly document that shows the list of tasks for a piece of equipment.

- There is a CREATE TASK SHEETS for Equipment button on the System tab that allows you to generate Task Sheets for a single piece or all equipment on a System. This is useful for previewing the Task Sheets.
- You can create a full set of Task Sheets from the Service Contract tab using the GENERATE TASK SHEETS button.
Customizing Task Sheets
You can customize the included Task Sheet template document to include your company logo and make any other changes you need.

- The Service Contract documents are stored on the workstation in the Application Data folder’s Reports/Service Tasks sub folder.
  - Go to TOOLS→OPTIONS→ESTIMATING MODULE and click the link to open the folder.

- You will want to copy the Generic version to a new file name and edit that version.
  - If you edit the included version, your changes will be overwritten with the next Studio update.

- To use the new version of the task sheet template, select it from the Custom Task Sheet Template list on the Estimating Module tab.

- As with other custom reports, custom service contracts can be distributed from your company’s server to all your users.
**Task Sheet Rules**

The tasks on the Task Sheet are grouped together into tables based on the Task Types. In some cases, tasks with the same name but different types (e.g. *Physical Verification* and *Software Verification*) may be merged into a single table with three columns.

- The Task Sheet rules are stored in an Excel spreadsheet in the same folder as the Task Sheet Template document. You can open the folder from **TOOLS**→**OPTIONS** on the *Estimating Module* tab.
- You can adjust the rules or make your own by
  - Copying the supplied version to a new file name in the same folder
  - Editing the rules in your copy
  - Selecting your version in the *Custom Task Sheet Rules* list on the **TOOLS**→**OPTIONS**→**ESTIMATING MODULE** tab.