





Quick Start Guide

Adding Industrial Equipment Units

Objectives:

- 1 Explore the equipment tab
- 2 Learn how to add industrial equipment units in 6 easy steps
- 3 Learn how to add custom component names





- The equipment tab allows you to to quickly access and manage your equipment. In this quick start guide, you'll learn how to easily:
 - ✓ Add industrial equipment units

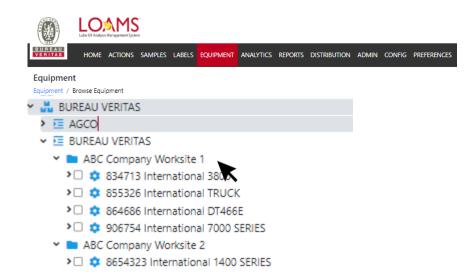






The first step begins by clicking the equipment tab and selecting the browse equipment tab.

In the browse tree tab, click on the worksites folder [■] to view your equipment unit list.

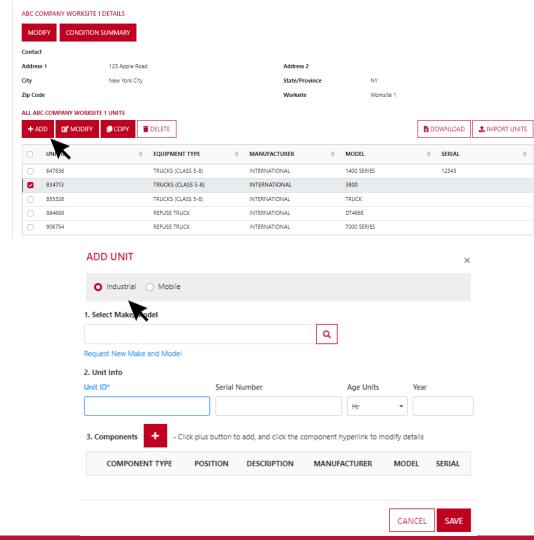






- After clicking the correct worksite folder, then click on the red add unit button under the units section on the right side. This action will open the add unit window.
- Once the add unit window opens, select the industrial option, and begin typing the make and model of your equipment unit. As you type, the "type to see your model..." field will begin to search and suggest results of relevant make and models. Select your make and model once it appears in the suggested results.

Please note, If you do not see the make and model of your equipment, click on the red lookup models button. In the lookup models window, select the option request new manufacturer and model, type the make and model of your equipment, and your request will be sent to your system administrator — to add this information to the master list. Also, if you do not know the make and model you can leave this field in blank.







- Next, type in a unique unit ID for you to identify your equipment and add the serial number of your unit if you have it available. You can also add unit components by making a click on the red plus button +.
- Now, click the drop down box and select the type of component you plan to add. Once selected, it will auto populate into the description field. If applicable, fill out the remaining fields. Once complete, click done and then click save and close. You have successfully added your industrial equipment. The new unit will now appear under your unit list and in the equipment hierarchy.



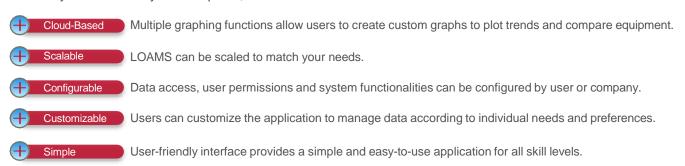
Please note, you can modify the description field to create custom component names.

● Industrial								
1. Select Make/Model								
				Q				
Request New Make and Model								
2. Unit Info								
Jnit ID*		Serial Number			Age Units		Year	
Demo Unit ID		ABC123			Hr	•	2022	
3. Components								
Type*		Position			Description*			
ENGINE	•			•	ENGINE			
Component Manufacturer / Model		Serial Number						
	Q							
Oil Type		Oil Capacity Oil Units			Sample Frequency (days)			
	Q			•				
Request New Oil Type								





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