ELTON User Guide (2019-06-28)

Overview

ELTON is the definitive tool for tracking not for sale Equipment inventories on the Salesforce.com cloud. If you are a system administrator looking to get ELTON setup in your org, look under the AccountAbility About Us tab in the app and download the ELTON Configuration Guide. It walk you through the options during setup of ELTON. Some options we recommend involving us and don't hesitate to contact support@accountabilitycorp.com with your questions.

- Equipment Orders or just Equipment?
- Assignment
- Typical process flow
- Request > Reservation > Loan > Return
    - Request
    - Request Fulfillment
    - Reservation
    - Loan
    - Return
    - Optional Steps
- Tabs
    - Equipment
    - Equipment Type
    - Equipment Orders
        - Equipment Order Dates
    - Equipment Order Lines
        - Commit
        - Process
        - Return
    - Equipment Requests
    - Equipment Calendar
    - Insurance
- Equipment Settings & Features
    - Collections
    - Manage Collections
    - Equipment Pools
    - Consumable
    - Lotted
    - Counts
    - List views
    - Equipment Images
    - Utilization Report

Printing labels
Clone & Mass Clone
Bar Codes
Related Lists: Contact, Account and Opportunity
ELTON Scanner Mobile app

Equipment Orders or just Equipment?

There are two ways to run ELTON, using Equipment Orders which allow you to book and process multiple pieces of equipment to a single User/Contact/Account/Opportunity at one time, or Equipment based transactions where you work with equipment records individually. When you work with Equipment Orders they are creating the very same individual records as if you had done equipment based transactions. So you can use one strategy or a combination of both. If the equipment you are working with goes to customers in groups then Orders makes sense. You will setup the order with dates and the associated User/Contact/Account/Opportunity and then enter the types of equipment or specific serial numbers you wish to use for the order. If you typically send out individual pieces (or just 2 or 3 pieces) of equipment then you can just work with the Equipment records directly.

Assignment

Assignment is the first step for every piece of equipment. If equipment is not assigned it cannot be loaned, or reserved. Assignment tells ELTON who or where the equipment belongs to. If your reps have “trunk stock” then the assignment is the Salesrep (User), if the Equipment is in your warehouse, the assignment will usually be to an Account that is your warehouse location. Assignments have no predictable end date, so they stay in effect until there is a new assignment. ELTON puts the return date on the assignment when the new assignment is created.

Typical process flow

ELTON users can have a fairly complex multi-step process that starts with a Sales Rep requesting equipment for a demo or they can use a very simple process of just loaning equipment. You can also use several steps between. Let’s describe the most complex scenario and you can decide which steps are required for your organization.

Request > Reservation > Loan > Return

The most complex scenario starts with an Equipment Request. This can be done as an individual request or a request can be a line of an order. For the processing the same basic steps are conducted. To eliminate the complexity for now we will walk through the process with individual records, then outline how Equipment Orders assists by working with multiple

equipment records at one time. Remember, it does not matter if you use orders or individual records the internal steps are exactly the same.

Request

An Equipment Request is done for a type of equipment (Equipment Type), not for a specific serial number. If a Sales Rep wants to offer a prospect an evaluation of an Ultrasound machine, they don't really care which specific machine gets sent, they just care that the correct model gets sent out. We use the Equipment Type to allow Sales Reps (or others) to request equipment, they just choose an equipment type to tell the system which type of equipment they want to send out. Requests can be as simple as an Equipment Type, Start-date, End-date and the related User/Contact/Account/Opportunity record. Additional fields can be added if required.

Usually for a Sales Rep they create the request and the process moves over to someone who is responsible for fulfilling that request.

Request Fulfillment

The person who is responsible for fulfilling the requests will use the Equipment Request tab and the Fulfill button to select the specific serial number that will be used to fulfill the request. After they have selected the exact equipment to be used the system will prompt the user to Convert the Request into a Reservation. A Reservation is the next step in the process and is different from the Request in that it has a specific piece of equipment selected (serial-no).

The fulfill screen uses a complex query to look at all current loans and future reservations to find only equipment that has availability during the desired dates. This eliminates the searching for available equipment by using a calendar and presents to the user a list of equipment that is available. The query uses the following criteria to determine if a piece of equipment is displayed in the fulfill screen.

1. Equipment must be Active
2. Equipment must be Assigned
3. No conflicting Equipment Reservation record based on the dates of the Request
4. No conflicting Equipment Loan record based on the dates of the Request

If the equipment selected during Fulfill, subsequently becomes unavailable during the requested dates, you can use the Unfulfill button to reverse the reservation and use Fulfill to select another piece of equipment.

Reservation

The reservation is a booking for a specific piece of equipment for specific dates. Essentially a Reservation is a future dated Loan that just has not happened yet. In ELTON a reservation will prevent the equipment from being double booked and the equipment will not show as available for the reserved dates. When the date arrives that the equipment is actually being shipped, the user will use the Convert to Loan button to create the Equipment Loan record.

Loan

The Loan is the record that records that the equipment has actually moved to the customer/prospects site. Loans have a Start-date, Estimated Return-date and Actual Return-date. You can use the system to monitor loans that are coming due for return or loans that are past due. Only when the loan is returned does the Actual Return-date get updated in the system.

Return

There are several ways to return a loan in ELTON. They all do effectively the same thing, update the actual return date. You can find the equipment loan record and use the Return button, you can use the mobile application and scan equipment as returned, or you can bring up an equipment order and use the “Return” button.

Select Available Equipment

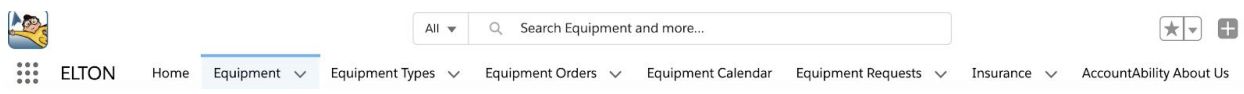
This button is available on the Equipment Order page. This allows users to add equipment to an order that is known to be available between the Equipment Order dates and add several pieces of equipment to an order from one page as either a reservation or a loan. This page respects existing list views of Equipment and has administrator configurable filters. There is a separate white paper on setting up the Select Available Equipment function. Select Available Equipment does not support Equipment Pools nor Consumables.

Optional Steps

ELTON does not require a reservation or request to use the loan system. You can just select equipment and create loans directly. You should map out the process that best suits your organization and implement the required steps. Some ELTON clients use a combination depending on the equipment.

If your sales reps have “trunk stock” of smaller common equipment they may just loan the equipment without a request or reservation. If larger equipment is fulfilled from a regional/central facility then they may need to request those types of equipment.

Tabs



Equipment

The Equipment Tab is where you find all the Equipment records in the system. We highly recommend that you create some List Views (standard SFDC functionality) to allow you to easily work with different groups of Equipment.

Most fields are self-explanatory and where additional help is required we have added the help text that appears when you hover over the field help icon.

Depending on how your System Administrator setup the page layout you may see several related lists.

- Equipment Loans - Shows both the current and all historical loans for this piece of equipment
- Equipment Assignments - Shows both the current and all historical assignments for this piece of equipment
- Equipment Reservations - Shows both the current and all historical reservations for this piece of equipment
- Equipment Shipments - If the equipment record is a consumable item, this will show all shipments of this item
- Equipment Order Lines - This will show every order line that this piece of equipment has been on
- Component Equipment Records - If this record is a Collection Master (read the section on Collections) the components of the collection will be displayed here
- Equipment Counts - Shows a list of records that are created when the Count function is used, this allows users to confirm the equipment is present, record condition and optionally attach photos
- Equipment Maintenance - Shows a list of records that are created when the equipment has had maintenance work performed
- Equipment Quantity Adjustments - If the equipment is and equipment pool record or consumable these records show the in/outs for the equipment

Depending on how your system administrator has setup the page layout you may see only a portion of the related lists above.

Equipment Type

Equipment Types is used to group equipment for reporting and creation of requests. You can think of this a model number master file. If your company sells cell phones and one of your popular models is the Peach X, you would have a single record in the equipment type for a Peach X. If you have 50 Peach X's in stock you would have 50 Equipment records each with a unique serial number but each one would be associated with the Equipment Type Peach X.

Equipment Types have a few related lists also, again depending on how your system administrator has configured your system you may see all or some of the following related lists.

- Equipment - Shows all the equipment records in the system that are related to this equipment type
- Equipment Requests - Shows all current and historical requests for this type of equipment
- Equipment Order Lines - Shows all order lines that are a request for this type of equipment

Equipment Orders

Equipment Orders allow users to group several transactions together that are going to the same User/Contact/Account/Opportunity. They can then enter several Order Lines to specify requests, reservations, loans or assignments that will happen when the order gets committed or processed. Orders are optional and offer customers that send several pieces of equipment to a single User/Contact/Account/Opportunity to select the dates and related record just once and then add lines that represent the equipment to be sent.

Equipment Order Dates

Date	**Request (Serial)**	**Reservation (Serial)**	**Loan (Serial, Equipment Pool)**	**Shipment (Consumable)**
Commit Start Date	Date the record is created	Not Used	Not Used	Date the Quantity is Committed
Process Start Date	Request Start Date	Reservation Start Date	Loan Start Date	Shipment Date
Estimated Return Date	Request Return Date	Estimated Return Date	Estimated Return Date	Not Used
Return Date	Not Used	Not Used	Actual Return Date	Not Used
Loan Extra Date 1 & 2*	Loan Extra Date 1 & 2	Loan Extra Date 1 & 2	Loan Extra Date 1 & 2	Not Used

* Loan Extra Date 1 & 2 are two additional date fields that we carry through the system. These can be re-labeled, using the Translation Workbench - Override function in Salesforce. You would also need to add them to page layouts for users to be able to see/enter these additional dates.

Equipment Order Lines

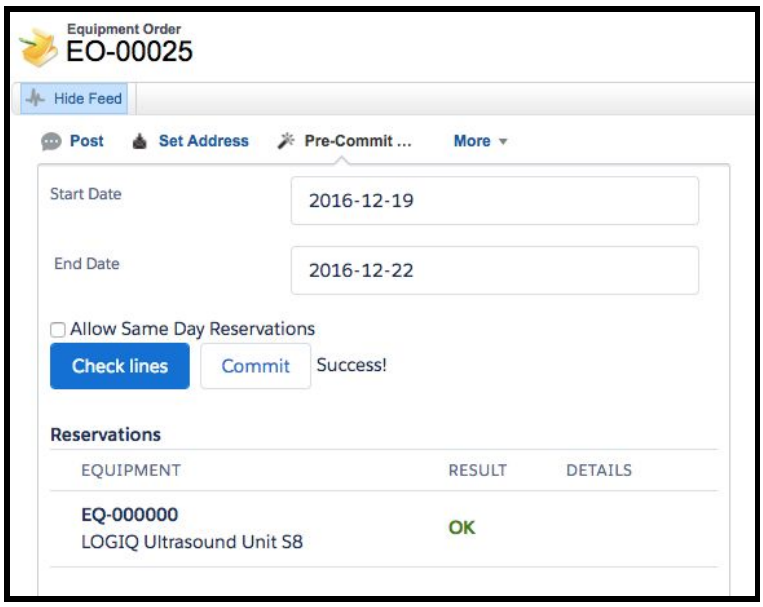
Equipment Order lines can be one of a few possible types;

Assign	This line will create an Assignment change for the Equipment selected
Request	This line will create an Equipment Request for the Equipment Type selected
Reservation	This line will create an Equipment Reservation for the Equipment selected
Loan	This line will create an Equipment Loan for the Equipment selected
Consumable	This line will create an Equipment Shipment for the Equipment selected

Dates on the Equipment Order Line will default from values entered into the Equipment Order, but may be changed if required. If the Order has not been committed then date changes on the Order will cascade to the Order Lines. If the Order has been committed then you must change dates on the lines individually, or use out Change Dates Chatter Action.

Consumable Equipment which is a separately licensed feature is a different type of equipment that gets consumed rather than returned during the process of a loan. These are typically used to record disposable items like gels, film or other items that will be shipped but are not expected to return. Consumables create Equipment Shipment records.

Pre-Commit Action



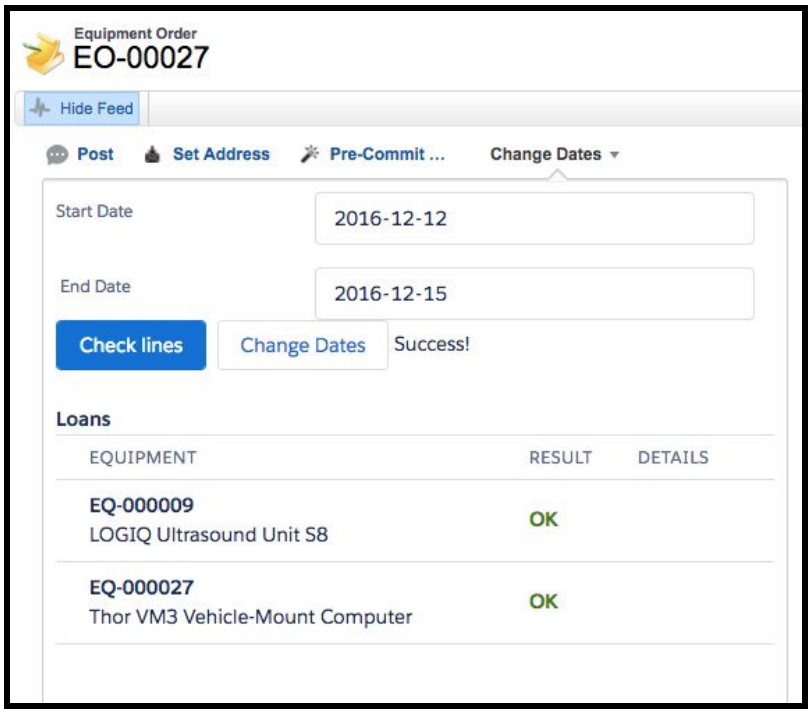
Pre-commit Chatter Action allows users to see if there will be any conflicts with the dates and equipment or equipment types on the order. Click Show Feed if the feedbar is currently hidden. Select the Pre-Commit Action. The Action shows a Start Date and End Date from the Equipment Order. Push the Check lines button and the system will determine if there would be any issues with committing the order with theses dates. Various sections show you Equipment or Equipment Types that would be OK or NOT OK if you were to commit the Order. You may try different dates by editing the dates in the Pre-Commit window and pressing Check lines again. Once you have dates that work, press the Commit button to save the order with the new dates.

Extend Order Action

Extend Order allows you to enter a new Estimated Return date for the order and validate to confirm that changing this date will not cause any conflicts with upcoming transactions. Only orders that have been Processed should use the Extend Order action. Click Show Feed if the feedbar is currently hidden. Select the Extend Order Action. Enter the new desired End Date and click Check lines. Results will be displayed showing OK and NOT OK lines. If all lines are OK you may press the Extend Order button. The order will be saved with a new Estimated Return date.

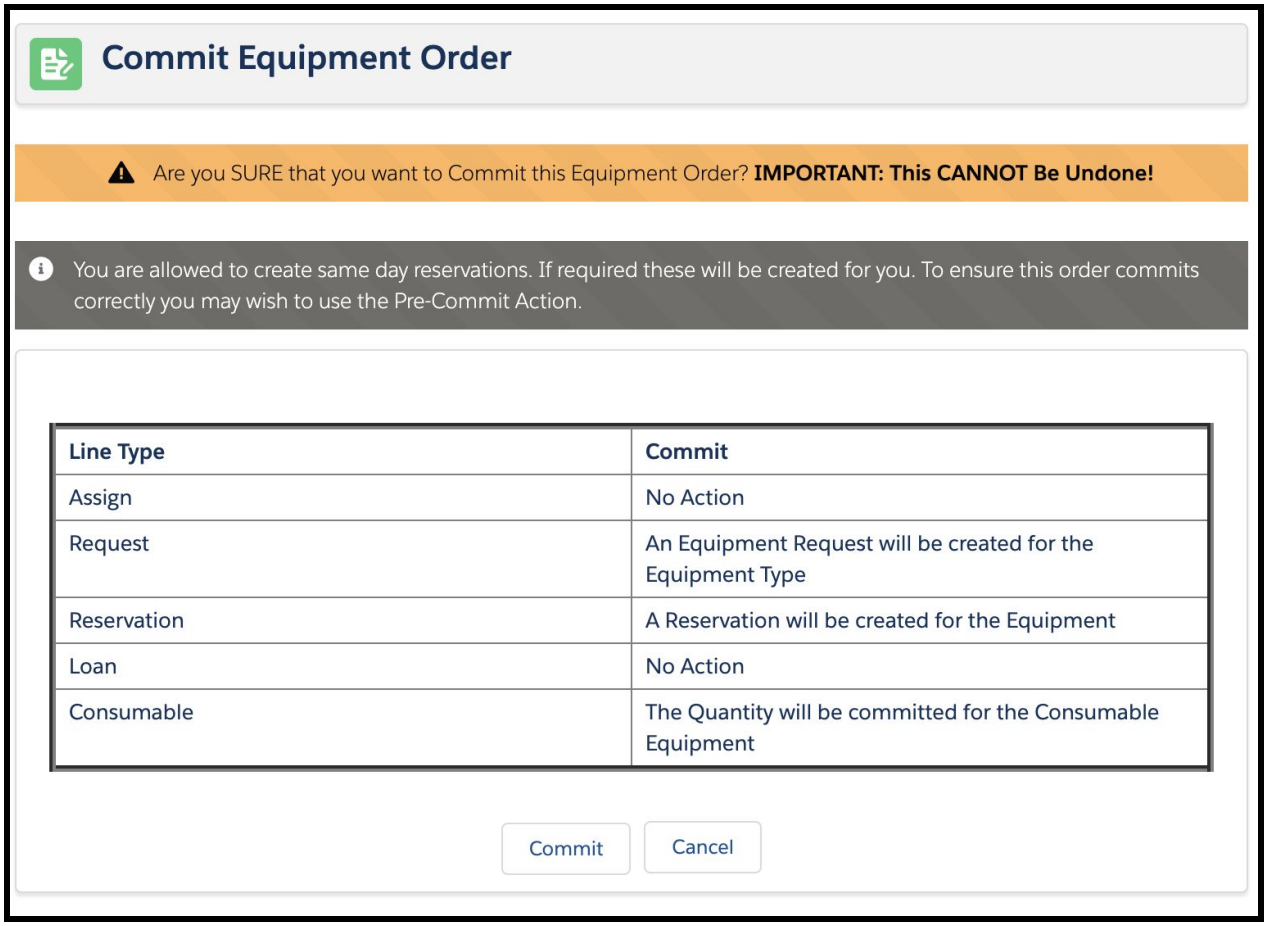
Change Dates Action

Change Dates Action will allow you to enter new Start Date and End Date and have the system check to see if any conflicts would be created with the new dates. Click Show Feed if the feedbar is currently hidden. Select the Change Dates Action. Enter the new desired Start Date and End Date and click Check lines. Results will be displayed showing OK and NOT OK lines. If all lines are OK you may press the Change Dates button. The order will be saved with a new Start Date and End Date.



Commit

The Commit button starts the cycle of an Equipment Order. Users press Commit when they have the Order Lines they want and the Order is ready to move to the next step. Depending on the type of line different actions will be taken by the system during the commit step. The following chart is displayed each time the commit button is pressed. It shows the user what actions will be taken by the system when Commit is pressed.

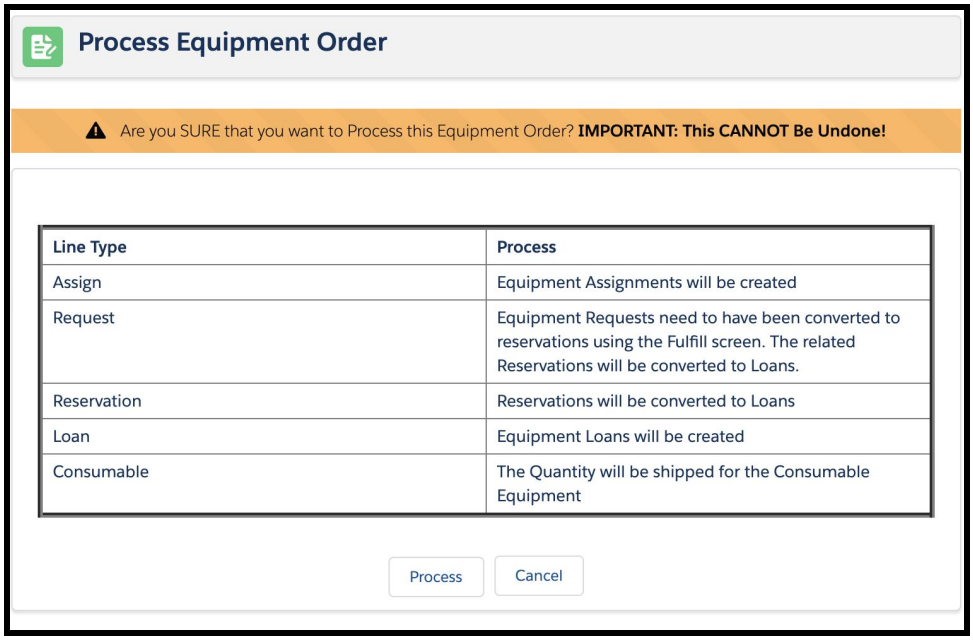


If there are Request lines on your order, someone will need to fulfill each request line to select the serial-no that will be used to fulfill that Request. Once each Equipment Order Line that is a Request has been fulfilled and a reservation created the order is ready to be Processed.

Commit passes the work of creating the various records off to a background process. It may take several seconds for commitment to finish depending on the size of the order. You can just refresh your screen, when Commit has been done the Order Status will change to Committed.

Process

Process moves all the lines of the order into the next logical step. Again the following message is displayed to remind the user of the actions the system will take during the Process step.

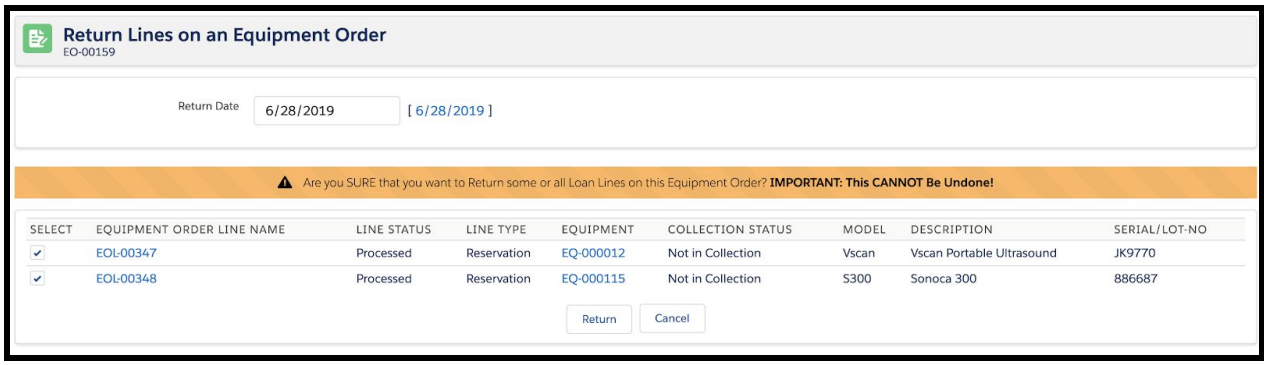


This is where the heavy lifting is going on. Again the work is passed to a background process that can take some time to finish. Assignments, Loans and Shipment records are being created during the process step. Once completed the Order status will change to Processed.

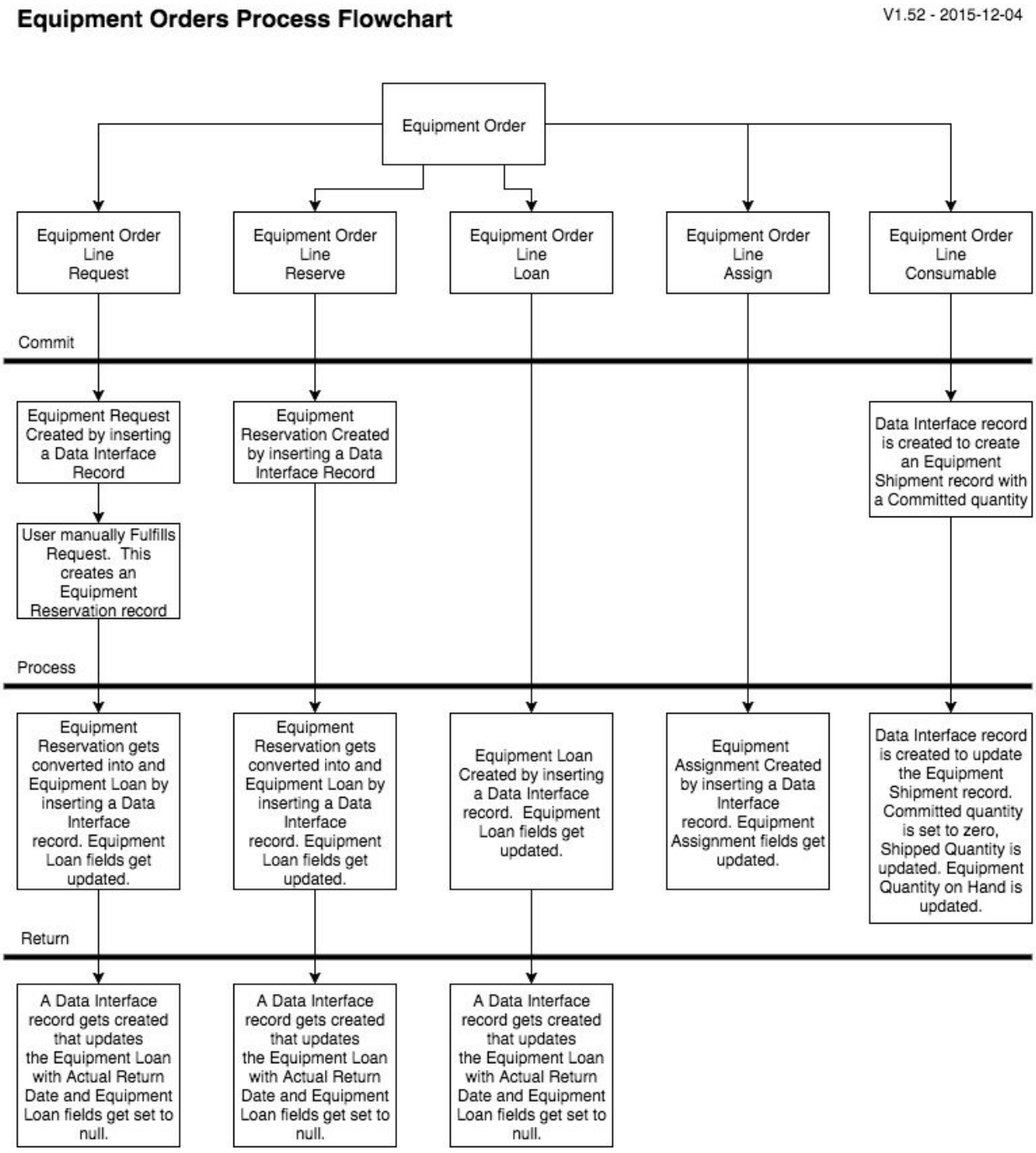
Return

If your Order had any Loans on it the final step is to return those loans. Return button does just that step for you. If you leave the Return Date blank on the Equipment Order, Return will default today as the Return Date. To override the Return Date, simply enter it into the Return Date field on this page.

Return allows the user to return all Loans or select some of the loans to be returned. Collections will be returned as a collection. If necessary you may remove components from a collection prior to processing the Return. See the Section called Manage Collections for more information. By default all lines are selected to be returned. Select the lines you wish to return and click the Return button.



This flowchart illustrates the Process Flow for an Equipment Order.



Equipment Requests

Equipment Requests are used when there is a need for a Type of equipment but the specific serial number is not known at the time of the request. A typical use case is that a Sales Rep wants to arrange for an evaluation of some equipment for a customer. They know the model number (Equipment Type) for the equipment they want to send, but someone else will select the specific serial number to send. The Rep creates an Equipment Request, identifying the Start Date, Estimated Return Date, User/Contact/Account/Opportunity and the Equipment Type. Once a Request has been converted to a Reservation, the Converted to Reservation will be checked and there will be a link in the Equipment Reservation field you can use to navigate to the Reservation.

When you create a Request from an Equipment Order Line, you still need to use the Fulfill button on the Equipment Request page to select the specific serial-no and create the reservation.

Equipment Calendar

The Calendar allows users to see Reservations, Loans or both on a scrolling calendar. Clicking on an existing record will bring up a dialog and offer the user some options to edit the record or open the Equipment associated with the record. Clicking on an empty slot in the calendar will allow the user to create either a loan or a reservation depending on which line the user clicked. For usability and performance it is recommended that you use filters on List Views that reduce the number of records displayed to a reasonable amount (approx 100 records).

Many of the user interface options can be control using a Custom Setting, contact your system administrator for assistance. While running the Calendar you may use the Options pane to control many aspects of the calendar including; Date range, Show Empty Rows, Show/Hide Collection Components, Show/Hide loans or reservations for User, Contact, Account or Opportunity and Order by (sort) of the calendar records.

Insurance

You may optionally set up insurance policies in the Insurance records. Then you can associate different Equipment records with the Insurance policy. As Equipment records get added to the policy record we update the Total Equipment Cost field by adding up the Equipment Cost field from each Equipment assigned to that policy. This allows you to quickly see the total value of all Equipment on any given policy.

Equipment Settings & Features

Collections

Collections are kits or groups of equipment that move as a set. For example if you are loaning out an Ultrasound unit it may consist of a Console, 2 or 3 probes, power supply and a carry

case. These can be setup as Collections in ELTON. When the user loans any component of the collection all other components are also loaned. The top level of a collection is referred to as the Collection Master and all other parts of the collection are referred to as Components. To create a collection go to the Equipment detail page of one of the components of the collection and edit the Collection Master Equipment field to select the collection master. You will notice that the Collection Status field will change from Not in Collection to Component. This same field on the Master will have changed from Not in Collection to Master. The Collection status field is maintained by the system. To remove a component from a collection simply blank out the value in the Collection Master Equipment field. All components of collections are added to a related List on the Equipment Master called Component Equipment Records.

Collections are Assigned, Reserved and Loaned as a collection. You must remove components to Assign, Reserve or Loan them separately.

Manage Collections

In the Component Related List of a Collection is a button called Manage Collection. This button allows you to remove components from a collection even if they are are Loan or part of a Processed Equipment Order. This page will inform you if any linked transactions are affected and it will generate the necessary records for the component being removed to be a discrete piece of equipment.

Equipment Pools

If the Equipment Pool check-box is checked for an Equipment record then the record will represent multiple identical pieces of equipment that are not serialized. A good example of this might be power cords. Rather than creating 100 discreet records for 100 power cords you can create an Equipment Pool and have a Quantity on Hand of 100. When items are not serialized and you do not need to track which specific unit is at a location Equipment Pools are useful.

Consumable

Consumable records are used to track products that go on a Loan but are never expected to return. Quantity on Hand is supported to Consumable records and when a Shipment is processed for a Consumable item the Quantity on Hand is reduced by the Quantity entered and a Shipment record is created against the User/Contact/Account/Opportunity. To continue with our Ultrasound example, consumables would be the gels or cleaning products shipped with the equipment. While the standard behavior of Consumables is to ship and relieve stock, there is a Return of Consumable function so that if some consumables are returned they can be entered.

The use of Consumables in ELTON requires an additional license at additional cost. Please contact info@accountabilitycorp.com for pricing and to obtain a license.

Counts

Equipment Count records are used to audit or conduct physical counts of equipment inventories. Count records can be created on the Equipment Count related list, using the New button or you can utilize the Scanner Mobile app to create Count records. Each count record has a Condition pick-list that can be customized to suit your requirements. The user can optionally enter a note and if using the mobile Scanner app can take pictures of the equipment that get linked directly to the record in Salesforce. Also when using the Scanner app, GPS co-ordinates of the device are recorded if available and rendered into a map.

List views

List views are a powerful standard feature of Salesforce and makes using ELTON easier. We take advantage of list views to allow a couple of features that are special. When you create, save and optionally publish a list view on the Equipment page, that list view can be used to filter the Equipment Calendar and determine the records that appear on the Utilization Report. Make you list views in the standard way you do for other Salesforce objects, then when you go to the Equipment Calendar tab you will see a List View pick list, use that List View to select which Equipment records you wish have displayed on the calendar.

Equipment Images

ELTON allows you to display an Image and Thumbnail image for each piece of equipment. The images do not need to be stored on a Salesforce instance, they only need to have a publicly available URL that ELTON can use to display the image. Read the ELTON Configuration guide for setup instructions on Equipment Images.

Utilization Report

From any of the List Views on equipment there is an additional button called Utilization Report. This is a specialized report that cannot be created using the Salesforce Reports system. It will show you for the List View and date range that you select, how many days each piece of equipment has been on loan (utilized) as both a count of days and a percentage.

Printing labels

Another button on the Equipment List View is the Print Equipment Labels button. System Administrators must set up the label configuration using a Custom Setting prior to printing Equipment Labels. If this has not been completed you will receive an appropriate error message. Consult the ELTON Configuration Guide on how to setup the Labels Custom Setting.

To print labels use the check-box control on the list view to select the Equipment records to print labels for and then click the Print Equipment Labels button. The standard labels print on to

Avery 5162 or equivalent sheet labels. (4” x 1 1/3”, 2 across, 7 down) Follow the instructions on screen when printing on partially used sheets of labels.

Label data can be exported and loaded into industrial label production software for more sophisticated layouts or label materials. many of our customers find that the paper labels with a protective clear coating are quite durable.

Clone & Mass Clone

Cloning of Equipment records does not use the standard SFDc clone system. Your System Admin must setup a field set on equipment for Clone fields and required fields. Cloning can optionally do the assignment step after cloning. The clone page will prompt the user to select if Assignment is also done after the clone is created.

Bar Codes

ELTON produces a unique QR Code for every record in the system. Our built in label printing feature prints the QR Code along with some human readable field onto each label. Sometimes Equipment is provided with a unique Bar code already affixed. The ELTON Scanner app can use either QR Codes generated by ELTON or unique bar codes. During Data load if you have the bar code information it can be loaded into the Equipment Tag field. Equipment Tag is not mandatory but is enforced as unique.

When using the ELTON Scanner app when a bar code is scanned the system will search through the Equipment records trying to match the scanned value to an Equipment Tag. If a match is found the Equipment record is selected.

Using this feature you could also obtain sequential pre-printed bar code tags and affix them to your equipment as acquired. Then by entering the bar code value into the Equipment Tag field you will link the Bar Code to the correct Equipment record.

Related Lists: Contact, Account and Opportunity

ELTON adds optional related lists that can be added to the page layouts for Contact, Account and Opportunity. Contact your System Administrator to add or remove any of these related lists. Unless noted below the New button must be disabled on these related lists as the required validations and background updates will not be performed unless created using the ELTON pages.

- Equipment Requests - All current and historical Equipment Requests (New supported)
- Equipment Reservations - All current and historical Equipment Reservations
- Equipment Orders - All current and historical Equipment Orders (New supported)
- Equipment Shipments - All Shipments of Consumable Equipment
- Current Equipment Loans - Only Current Equipment Loans

- Current Equipment Assignments - Only Current Equipment Assignments
- Historical Equipment Loans - Only Historical Equipment Loans
- Historical Equipment Assignments - Only Historical Equipment Assignments

ELTON Scanner Mobile app

Obtain the mobile app by searching for ELTON Scanner on either the AppStore (Apple) or on Google Play for Android devices.

Use the ELTON Scanner app to Assign, Loan, Return, Count or View equipment by scanning QR Codes or Bar Codes. The app requires you to login using your Salesforce credentials and then allows users to record the above records directly in ELTON. The use of the ELTON Scanner app requires an internet connection. When recording Assignments, Loans, Returns or Counts GPS coordinates are recorded automatically and rendered in a map when viewed in ELTON.

The target audience for the ELTON Scanner is a remote user that has control of various Equipment and can re-assign, loan and return those loans without additional assistance from other users. A typical use case is a field rep that has trunk stock in their control, they use the Scanner app to record movement of their equipment.