

# CONTRACT

## CONTRACTS - SCHEDULED MAINTENANCE TASKS

Linking Tasks to a Contract means that you can monitor and generate Scheduled Maintenance to ensure the contract items are serviced and maintained regularly.

> Note: Remember that contracts are linked to specific machines or locations, so you need to select the relevant contract item *before* you can link a scheduled maintenance task to that item.

You will first need to set up tasks in order to be able to link them to a Contract.

Ribbon Access:Contract > Contracts

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## LINK A TASK TO A MACHINE

- The Contract Listing screen will open.
- Select the *Site* that you wish to work in.
  - ° In this example, *Durban* has been selected.



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• By default, this screen will list all the *Active* contracts for the selected site, select an *alternative* status, if required.

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#### **SELECT A CONTRACT**

- Select the *row* of the *contract* that is linked to the machine where you wish to view the linked tasks.
- Click on *View*.



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#### NOTE THE SERIAL NO.

- The *Maintenance for Contract No.: []* screen will open.
- Make a note of the *serial number* of the contract machine that you wish to link a scheduled maintenance task to.
  - In this image, serial No. *2020-102041* has been noted.



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#### NAVIGATE TO THE ASSETS LISTING SCREEN

- You now need to navigate to the *Assets Listing* (*Machine List for* []) screen.
- Click on the *Equipment and Locations* ribbon tab.



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• Click on *Assets*.



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- The *Machine List for []* screen will open.
- Use the <u>filter row</u> to type in and search for the serial no. noted in the previous step.



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• You can now view your initially selected machine.



#### **SELECT MACHINE**

- Select the *row* of this machine.
- Click on the *Maintenance* tile.



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#### **ASSIGN A TASK TO THE MACHINE**

• Follow the steps in the Assets: Assign A Taskmanual to complete this process of assigning a maintenance task schedule to a contract machine.

## LINK A TASK TO A LOCATION

In the *Contract Listing* screen,

- Select the *site*.
  - ° In this example, *Durban* has been selected.



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• By default, this screen will list all the *Active* contracts for the selected site.

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#### SELECT THE CONTRACT

• Select the *row* of the *contract* linked to the *location* where you wish to link a maintenance task schedule.

#### **NOTE CUSTOMER**

- Take note of the customer *code* and customer *name*.
   In this image, Contract CO000020 for HOP001,
   Hope Works has been selected.
- Click on *View*.

Help v2.5.0.14 - Pg 18 - Printed: 25/06/2024



200				Contract	Listing - BPO: V	ersion 2.1.0.56 - Exam	ple Company			<i>P</i>	X
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		C0000028	OPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Depart
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Hold History		C0000038	OPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Depart
	-	C00000041	OPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 30/ 2016	05 Jul 2021	Sales Depart
	- 14	C00000042	OPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
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	12	C00000044	CPC	Main	B0T0001	Bothas Networking Inc	c Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Depart
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Credit Notes		Ę.									,



#### NOTE THE LOCATION DESCRIPTION

- The *Maintenance for Contract No:* [] screen will open.
- Take note of the Location *Description* where you wish to link a scheduled maintenance task.
  - In this example, the location *Forest Hills Centre* has been noted.



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#### NAVIGATE TO CUSTOMER LOCATIONS

- You now need to navigate to the *Customer Locations* screen.
- Click on *Sales*.

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• Click on *Customers*.



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- In this module, ensure that your screen is set to the correct *Site*.
- Ensure that you are in the *Active* status.



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#### SELECT CUSTOMER

- Click on the *row selector* in front of the *customer* that you took note of being linked to the selected contract.
  - ° In this case it was HOP001 **Hope Works**.
- Click on the *Locations* tile.



	٠					Customer Listing -	BPO: Version 2.1	1.0.56 - Example C	ompany		2	D X
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#### **SELECT LOCATION**

- The *Functional Locations for Customer []* screen will open.
- Select the *row* of the *location* that you took note of.

#### ADD MAINTENANCE METHODOLOGY

• Click on the *Maintenance Methodology* tile.



	٠				Functional Locat	ions for Cus	tomer HOP001 - BPO: Vers	ion 2.1.0.56 - Exa	imple Compar	ij			н.	0		X
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- The *Maintenance Methodology for location: []* screen will be displayed.
- Click on Add.



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• Follow the steps in the Assets: Assign A Task manual to complete this process of assigning a maintenance task schedule to a *loc-ation*.

MNU.112.004