

PROJECTS

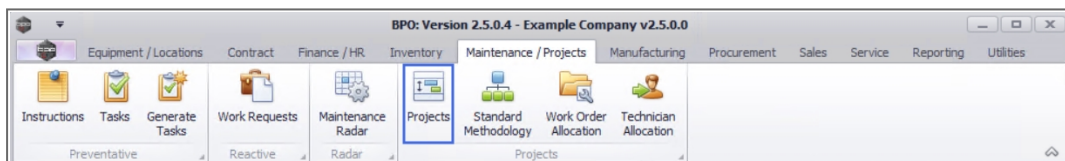
WORK ORDERS – LINK CUSTOMER CONTACT

Use this method if you are linking one (or a few) work orders to a project.

When linking multiple work orders, it will be easier to use the [Projects - Work Orders](#) functionality.

For the purpose of this manual, the Customer Contact has been linked after the Work Order was created, but can be linked when the Work Order is created.

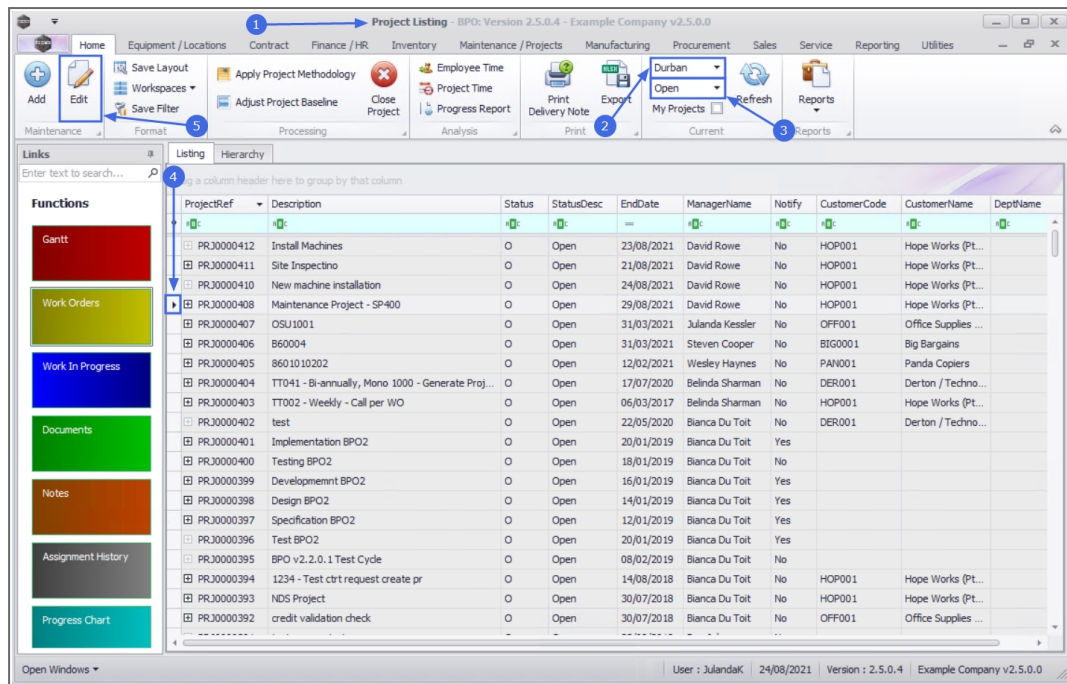
Ribbon Access: *Maintenance / Projects > Projects*



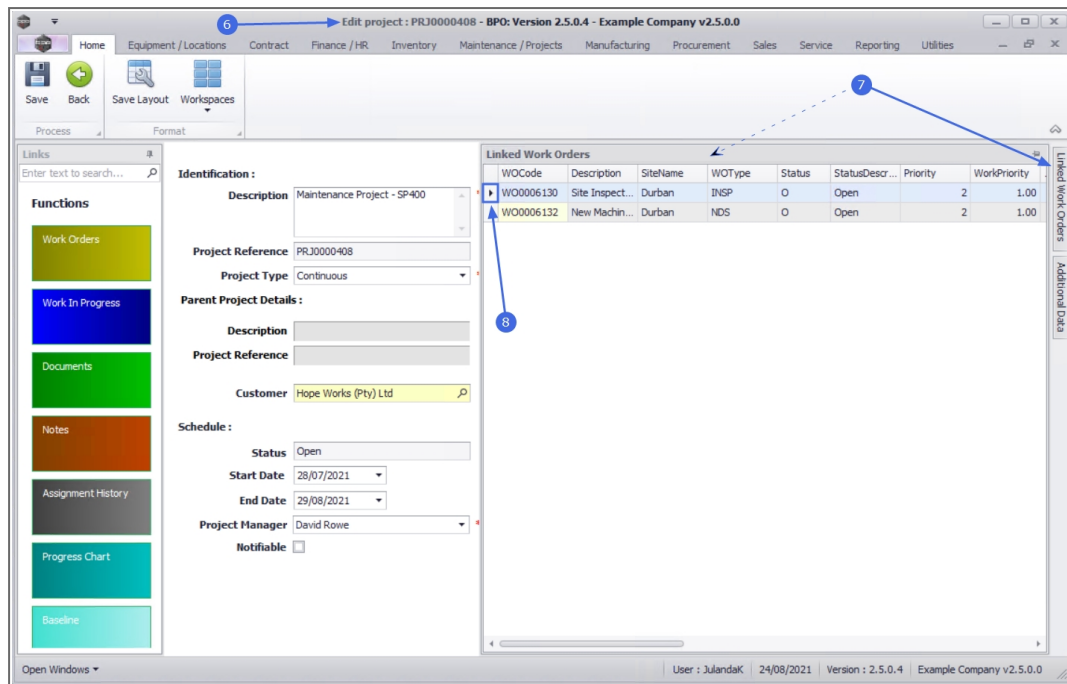
1. The **Projects Listing** screen will be displayed.
2. Select the **Site** where the project can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Click on the **row** of the project you wish to link a customer contact to.
5. Click on **Edit**.



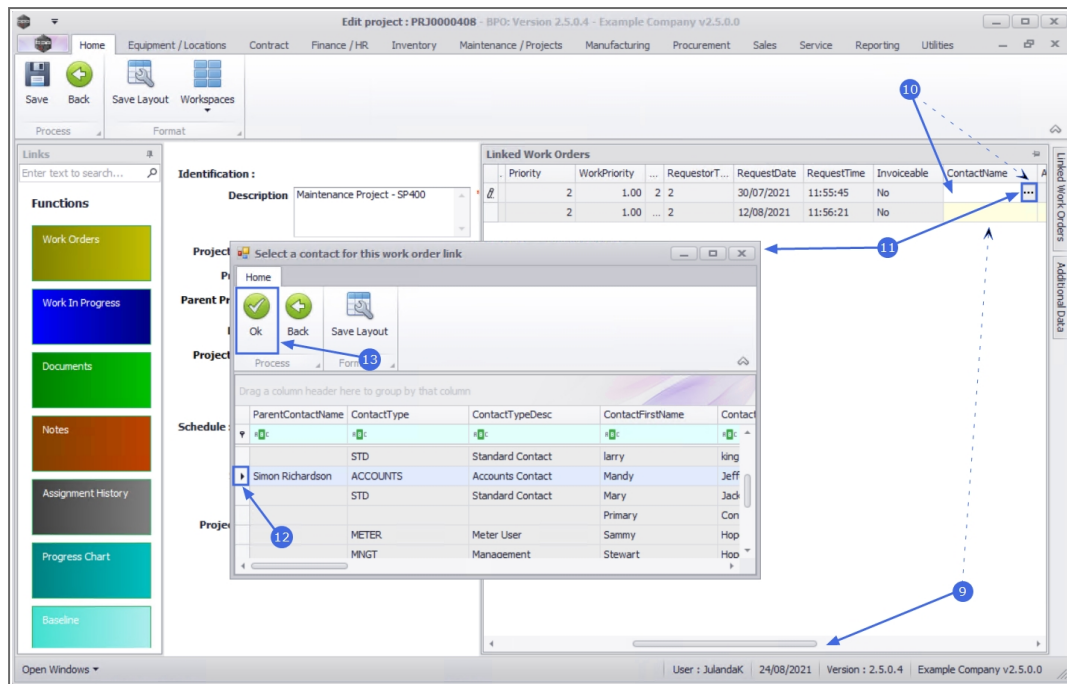
Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.



6. The **Edit project : [project ref number]** screen will be displayed.
7. Click on the **Linked Work Orders** tab to display the Linked Work Orders panel.
8. Click in the **row** of the work order you wish to link a customer contact to.

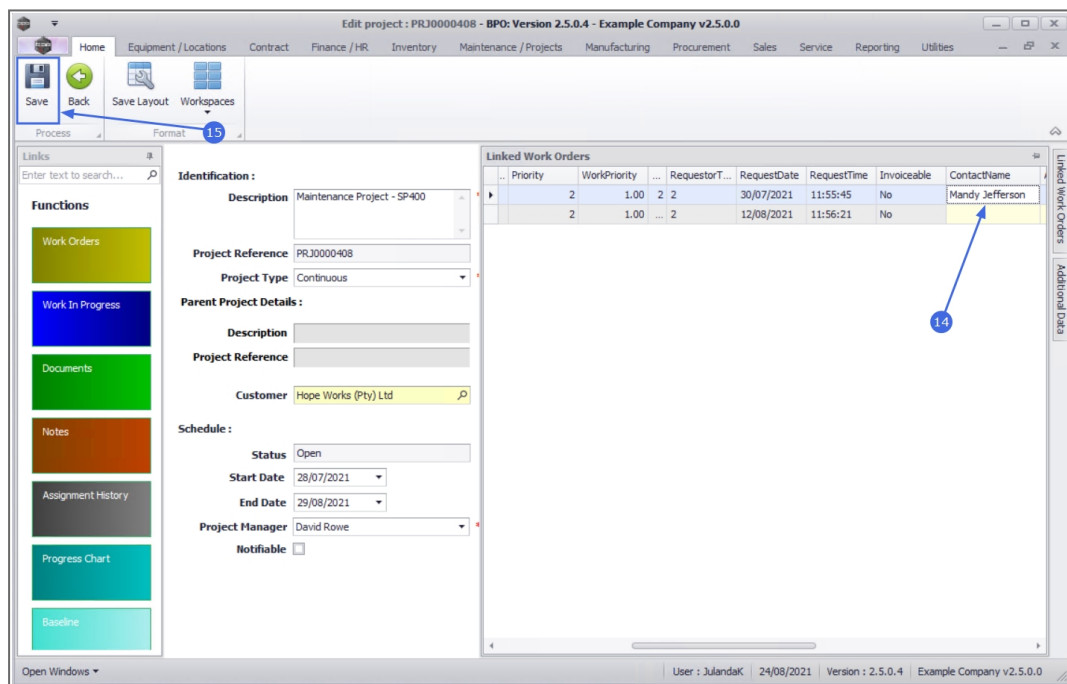


9. Use the **scroll bar** at the bottom of the Linked Work Orders panel to scroll until you can see the **Contact Name** field.
10. Click in the **Contact Name** field of the selected work order row to display an **ellipsis** button.
11. Click on this button to display the **Select a contact for this work order link** screen.
12. Click on the **row** of the **contact** you wish to **link** to this work order.
13. Click on **OK**.

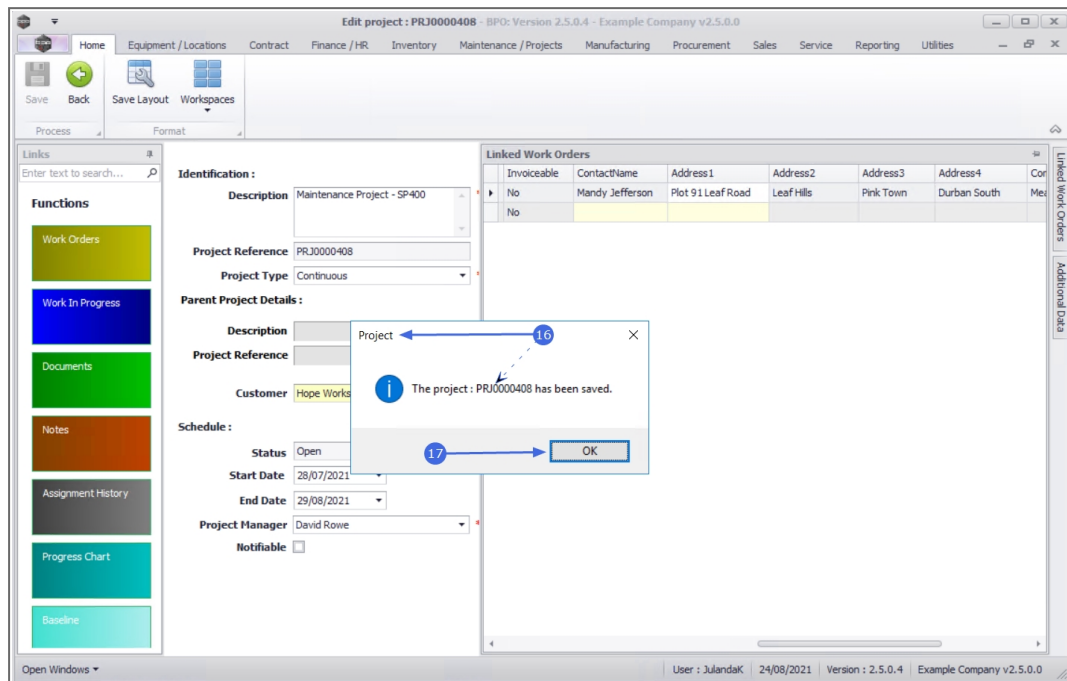


14. You can now view the **selected contact** in the **Contact Name** field.

15. Click on **Save**.



16. When you received the **Project** message to confirm;
 - **The project: [project ref number] has been saved.**
17. Click on **OK**.



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