

CONTRACT

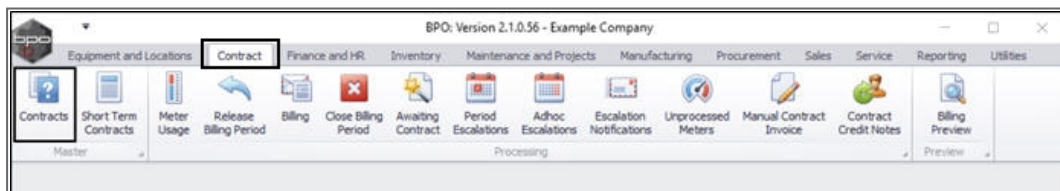
CONTRACTS - SCHEDULED MAINTENANCE TASKS

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*



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.

Contract Listing - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract

Processing Format Status Processing

Links Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows

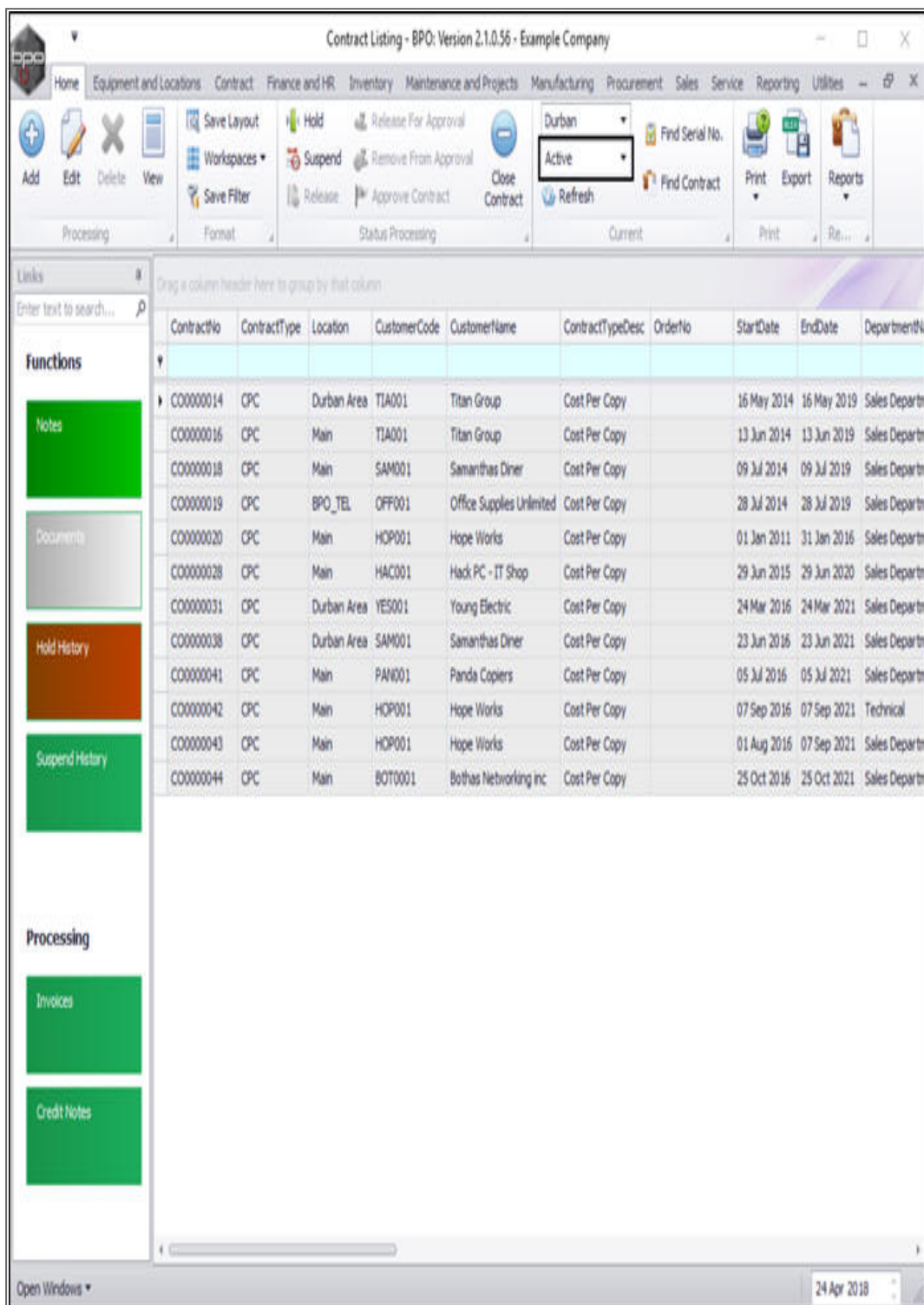
24 Apr 2018

Durban

ID	Name
0	All Sites
1	Durban
2	Pretoria
3	Cape Town

ContractNo	ContractType	Location	CustomerCode	CustomerName	Cost Per Copy	StartDate	EndDate	Department
CO0000014	CPC	Durban Area	TJA001	Titan Group	Cost Per Copy	16 May 2014	16 May 2019	Sales Depart
CO0000016	CPC	Main	TJA001	Titan Group	Cost Per Copy	13 Jun 2014	13 Jun 2019	Sales Depart
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy	09 Jul 2014	09 Jul 2019	Sales Depart
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy	28 Jul 2014	28 Jul 2019	Sales Depart
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy	01 Jan 2011	31 Jan 2016	Sales Depart
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy	29 Jun 2015	29 Jun 2020	Sales Depart
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy	24 Mar 2016	24 Mar 2021	Sales Depart
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy	23 Jun 2016	23 Jun 2021	Sales Depart
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy	05 Jul 2016	05 Jul 2021	Sales Depart
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy	07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy	01 Aug 2016	07 Sep 2021	Sales Depart
CO0000044	CPC	Main	BOT0001	Bothas Networking Inc	Cost Per Copy	25 Oct 2016	25 Oct 2021	Sales Depart

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



Contract Listing - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release Suspend Remove From Approval Release For Approval Remove From Approval Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentName
CO0000014	CPC	Durban Area	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Department
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Department
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Department
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Department
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Department
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Department
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Department
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Department
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Department
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Department
CO0000044	CPC	Main	BOT0001	Bothas Networking Inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Department

Open Windows 24 Apr 2018


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**.

CO3 Technologies (Pty) Ltd © Company Confidential

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.



Maintenance for Contract No. : CO0000043 - Status : A - BPO: Version 2.1.0.56 - Example Company

Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities

Back

Save Layout

Workspaces

Pro...

Format

Links

Enter text to search...

Contract Info

Customer Info

Billing Info

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
HMACH	New Machine		nm10301		Reception	Plot 91 Leaf Road, Forest	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041		Reception	Plot 91 Leaf Road, Forest	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103053	AREG000048	First Floor	1 Postal, Address, postal 3	

Open Windows

24 Apr 2018

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.

Maintenance for Contract No. : CO0000043 - Status : A - BPO: Version 2.1.0.56 - Example Company

Home **Equipment and Locations** Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces

Pro... Format

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows

24 Apr 2018

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
HMACH	New Machine		nm10301		Reception	Plot 91 Leaf Road, Forest	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041		Reception	Plot 91 Leaf Road, Forest	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103053	AREG0000048	First Floor	1 Postal, Address, postal 3	

- Click on **Assets**.

Maintenance for Contract No. : C00000043 - Status : A - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Assets Depreciation Functional Locations

Equipment Locati...

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
nm10301	New Machine		nm10301		Reception	Plot 91 Leaf Road, Forest	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041		Reception	Plot 91 Leaf Road, Forest	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103053	AREG0000048	First Floor	1 Postal, Address, postal 3	

Open Windows

24 Apr 2018

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

Machine List for Durban - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Durban All Refresh Revalue Convert Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links

Enter text to search...

Functions

WO History

Project History

Meters

History

BOM

Warranties

Notes

Documents

Open Windows

24 Apr 2018

Description	InventoryC...	SerialNo	ModelNo	AssetRegNo	CustomerName	DeptName	Status	Pri
SP2020 Sprint Colour Multi Functional Copier	SP2020	20-12345	SP2020	123	Hope Works	Technical	A	
SP1919 Sprint Colour MFC	SP1919	19-12345	1919		Derton Technologies		A	
SP1919 Sprint Colour MFC	SP1919	19-90200	1919				A	
SP1919 Sprint Colour MFC	SP1919	19-90201	1919		Office Supplies Unl...		A	
Sprint copier	SP1818	18-30200			Hope Works	Technical	A	
K147 Kyocera Colour Copier	1458-96523	K147-123456789	K147		Office Supplies Unl...		A	
K147 Kyocera Colour Copier	1458-96523	SN13512345	K147				A	
K147 Kyocera Colour Copier	1458-96523	SN132413546	K147		Hope Works	Technical	A	
SP1919 Sprint Colour MFC	SP1919	20-857485	1919		Hope Works	Technical	A	
Kruger ZN Fax Machine	KZN-1227FB	sn12345568	ZN122		Young Electric	Sales Department	A	
K147 Kyocera Colour Copier	1458-96523	sn123	K147		Young Electric	Sales Department	A	
K147 Kyocera Colour Copier	1458-96523	14-9652365	K147		Westwood Dynamic		A	
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147a	SP2020				A	
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147b	SP2020				A	
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147c	SP2020		Derton Technologies		A	
SP1919 Sprint Colour MFC	SP1919	cvb123	1919				A	
SP19-12 Colour Copier	SP19-123456	SP19-12185274	SP19-12		Titan Group		A	
SP19-12 Colour Copier	SP19-123456	19-12/1201	SP19-12		Titan Group		A	
SP19-12 Colour Copier	SP19-123456	19-12/1202	SP19-12		Samanthas Diner		A	
SP19-12 Colour Copier	SP19-123456	1912-147258	SP19-12				A	
SP19-12 Colour Copier	SP19-123456	1912-102030	SP19-12				A	
SP19-12 Colour Copier	SP19-123456	1912-102031	SP19-12		Samanthas Diner		A	
SP19-12 Colour Copier	SP19-123456	1912-102032	SP19-12		Bothas Networking ...		A	
SP19-12 Colour Copier	SP19-123456	1912-102033	SP19-12				A	
SP19-12 Colour Copier	SP19-123456	1912-102034	SP19-12		Danny Storm IT Cafe		A	

- You can now view your initially selected machine.

SELECT MACHINE

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

Machine List for Durban - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Durban All Refresh Revalue Convert Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links

Enter text to search...

Meters

History

BOM

Warranties 1

Notes

Documents

Maintenance

Depreciation

Applied Filter : Contains([SerialNo], '2020-102041')

Drag a column header here to group by that column

Description	InventoryCode	SerialNo	ModelNo	AssetRegNo	CustomerName	DeptName	Status
		2020-102041					
SP 2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041	SP2020		Hope Works	Technical	A

Contains([SerialNo], '2020-102041')

Open Windows 24 Apr 2018

ASSIGN A TASK TO THE MACHINE

- Follow the steps in the [Assets: Assign A Task](#) manual 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.

Contract Listing - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract

Processing Format Status Processing

Links Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows

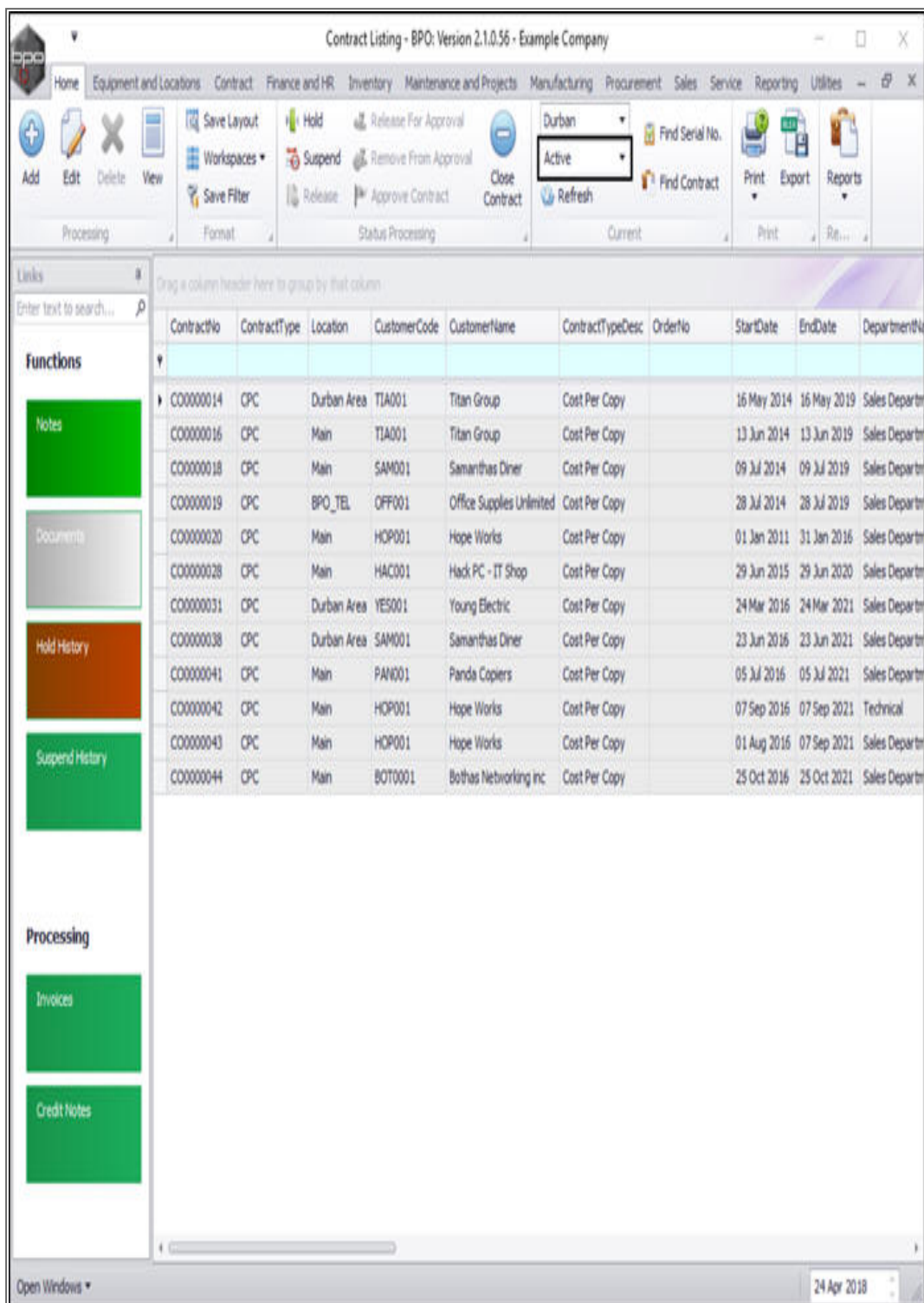
24 Apr 2018

Durban

ID	Name
0	All Sites
1	Durban
2	Pretoria
3	Cape Town

ContractNo	ContractType	Location	CustomerCode	CustomerName	Cost Per Copy	StartDate	EndDate	Department
CO0000014	CPC	Durban Area	TJA001	Titan Group	Cost Per Copy	16 May 2014	16 May 2019	Sales Depart
CO0000016	CPC	Main	TJA001	Titan Group	Cost Per Copy	13 Jun 2014	13 Jun 2019	Sales Depart
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy	09 Jul 2014	09 Jul 2019	Sales Depart
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy	28 Jul 2014	28 Jul 2019	Sales Depart
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy	01 Jan 2011	31 Jan 2016	Sales Depart
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy	29 Jun 2015	29 Jun 2020	Sales Depart
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy	24 Mar 2016	24 Mar 2021	Sales Depart
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy	23 Jun 2016	23 Jun 2021	Sales Depart
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy	05 Jul 2016	05 Jul 2021	Sales Depart
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy	07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy	01 Aug 2016	07 Sep 2021	Sales Depart
CO0000044	CPC	Main	BOT0001	Bothas Networking Inc	Cost Per Copy	25 Oct 2016	25 Oct 2021	Sales Depart

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



ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentName
CO0000014	CPC	Durban Area	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Department
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Department
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Department
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Department
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Department
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Department
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Department
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Department
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Department
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Department
CO0000044	CPC	Main	BOT0001	Bothas Networking Inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Department

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 **CO0000020** for HOP001,
Hope Works has been selected.
- Click on **View**.

Contract Listing - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes


Open Windows

24 Apr 2018

ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	Department
CO0000014	CPC	Durban Area	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Departm
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Departm
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Departm
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Departm
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Departm
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Departm
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Departm
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Departm
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Departm
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Departm
CO0000044	CPC	Main	BOT0001	Bothas Networking Inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Departm

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.



Maintenance for Contract No. : CO0000020 - Status : A - BPO: Version 2.1.0.56 - Example Company

Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities

Back

Save Layout

Workspaces

Pro...

Format

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
1458-96523	K147 Kyocera Colour Copier	K147	SDN32413546		Reception		Should see this, for physica...
	Forest Hills Centre				Forest Hills Centre	Forest Hills Centre	Plot 91 Leaf Road, Forest ...
	Pine Willows Centre				Pine Willows Centre	Pine Willows Centre	Plot 91 Leaf Road, Forest ...
SP1818	Sprint copier		1818-1111	AREG000223	Reception		Plot 91 Leaf Road, Forest ...

Open Windows

24 Apr 2018

NAVIGATE TO CUSTOMER LOCATIONS

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

Maintenance for Contract No. : CO0000020 - Status : A - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement **Sales** Service Reporting Utilities

Back Save Layout Workspaces

Pro... Format

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

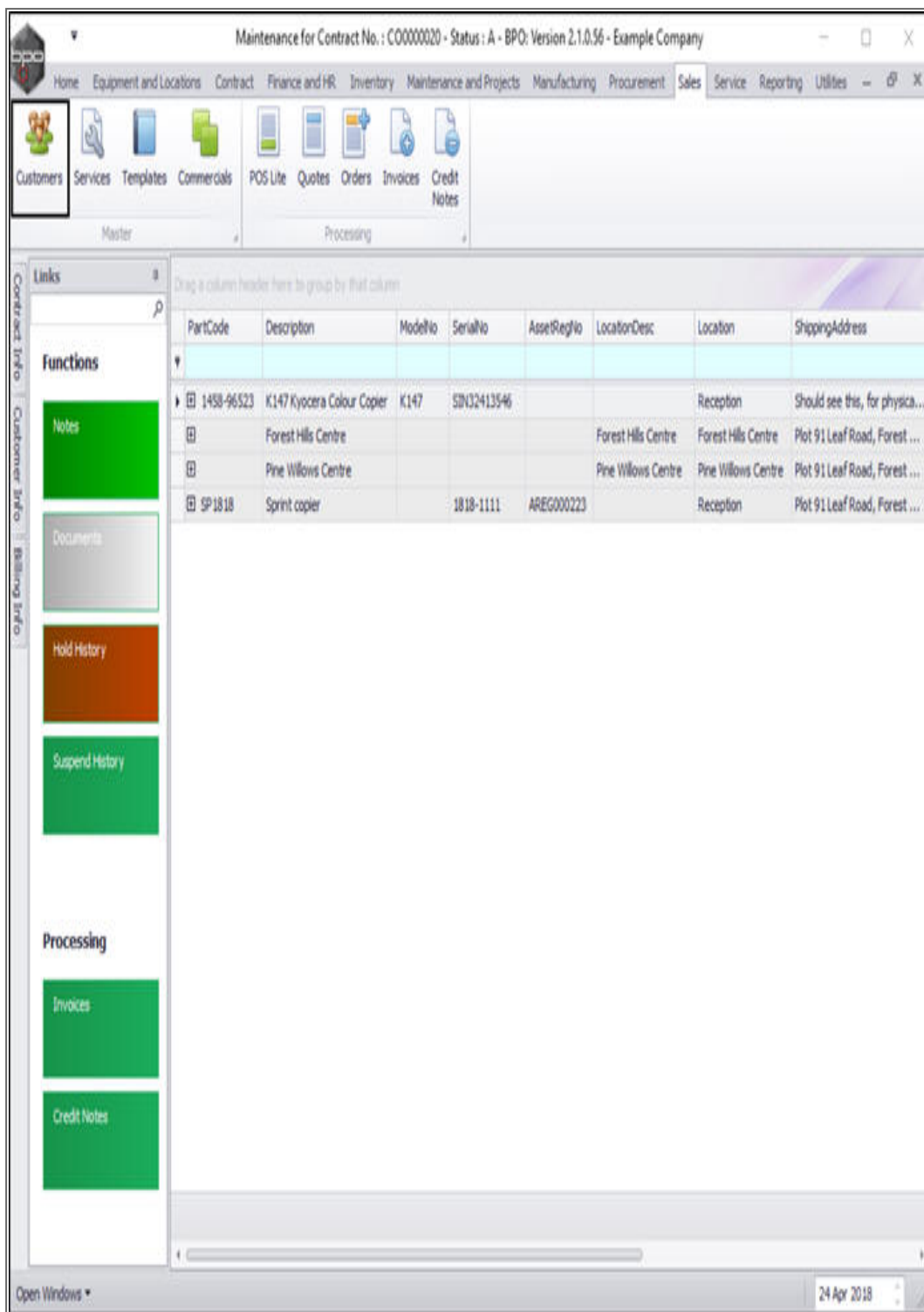
Credit Notes

Open Windows

24 Apr 2018

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
1458-96523	K147 Kyocera Colour Copier	K147	SDN32413546		Reception		Should see this, for physica...
	Forest Hills Centre				Forest Hills Centre	Forest Hills Centre	Plot 91 Leaf Road, Forest ...
	Pine Willows Centre				Pine Willows Centre	Pine Willows Centre	Plot 91 Leaf Road, Forest ...
SP1818	Sprint copier		1818-1111	AREG000223	Reception		Plot 91 Leaf Road, Forest ...

- Click on **Customers**.



Maintenance for Contract No. : C00000020 - Status : A - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Customers Services Templates Commercials POS Lite Quotes Orders Invoices Credit Notes

Master Processing

Links

Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
1458-96523	K147 Kyocera Colour Copier	K147	58V32413546		Reception		Should see this, for physica...
	Forest Hills Centre				Forest Hills Centre	Forest Hills Centre	Plot 91 Leaf Road, Forest ...
	Pine Willows Centre				Pine Willows Centre	Pine Willows Centre	Plot 91 Leaf Road, Forest ...
SP1818	Sprint copier		1818-1111	AREG000223	Reception		Plot 91 Leaf Road, Forest ...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows

24 Apr 2018

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

Customer Listing - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Sync View Save Layout Workspaces Hold Release Approve Account Define Account

Durban Active Refresh Export Reports

Processing Format Status Processing Current Reports

Links

Enter text to search...

Project History

History

Equipment

Contracts

Locations

Hold History

Invoice Delivery

Commercial Exceptions

Drag a column header here to group by that column

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CreditCheckDesc	CreditTermsDesc
CUS001	RE	Cash Sales Account	Sales	Sales Department	Durban	10 000.00	Terms and Limit	30 Days
HOP001	RE	Hope Works	Tech	Technical	Durban	100 000.00	Terms and Limit	30 Days
OFF001	RE	Office Supplies Unlimited			Durban	75 000.00	Terms and Limit	30 Days
YES001	CO	Young Electric	Sales	Sales Department	Durban	100 000.00	No Check	COD
BOT0001	IT	Bothas Networking inc			Durban	50 000.00	No Check	30 Days
SAM001	RE	Samanthas Diner			Durban	45 000.00	No Check	30 Days
DAN001	IT	Danny Storm IT Cafe			Durban	75 000.00	No Check	30 Days
PAN001	RE	Panda Copiers			Durban	50 000.00	No Check	COD
HAC001	IT	Hack PC - IT Shop			Durban	0.00	No Check	COD
PIN0001	GV	Pink Shoes			Durban	0.00	Terms and Limit	30 Days
GIL000001	GILLTTSPA	Dolf Lundgren			Durban	0.00	Terms and Limit	COD
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00	Terms and Limit	COD
JUS001	RE	Just In Time			Durban	50 000.00	No Check	30 Days
LIT0001	RE	Little Bee Honey			Durban	0.00	Terms and Limit	
GRE001	RE	Green Tea Supplies			Durban	75 000.00	Terms and Limit	30 Days
FIN0001	RE	Fine Hair Salon			Durban	0.00	Terms and Limit	COD
BET0001	RE	Betties Summer Shop a...			Durban	0.00	Terms and Limit	
blancad	RE	North West Branch			Durban	0.00	Terms and Limit	COD
DAN002	IT	Dancing Shoes			Durban	10 000.00	No Check	COD
BIG0001	CO	Big Bargains			Durban	10 000.00	Terms and Limit	COD
MAN0001	RE	Mandy Norton			Durban	0.00	Terms and Limit	COD
DAN0003	IT	Dance Shoes			Durban	0.00	Terms and Limit	
BIL0001	CO	Billys Barn			Durban	0.00	Terms and Limit	COD
ANO0001	ACC	Another new customer			Durban	0.00	Terms and Limit	
APP0001	RE	Apple Juice Inc	Sales	Sales Department	Durban	0.00	Terms and Limit	

Open Windows

24 Apr 2018

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.

Customer Listing - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Sync View Save Layout Workspaces Hold Release Approve Account Define Account

Durban Active Refresh Export Reports

Processing Format Status Processing Current Reports

Links

Enter text to search...

Project History

History

Equipment

Contracts

Locations

Hold History

Invoice Delivery

Commercial Exceptions

Drag a column header here to group by that column

CustomerCode	CustomerType	CustomerName	Department	DeptName	SiteDescription	CustomerCreditLimit	CreditCheckDesc	CreditTermsDesc
CUS001	RE	Cash Sales Account	Sales	Sales Department	Durban	10 000.00	Terms and Limit	30 Days
HOP001	RE	Hope Works	Tech	Technical	Durban	100 000.00	Terms and Limit	30 Days
OFF001	RE	Office Supplies Unlimited			Durban	75 000.00	Terms and Limit	30 Days
YES001	CO	Young Electric	Sales	Sales Department	Durban	100 000.00	No Check	COD
BOT0001	IT	Bothas Networking inc			Durban	50 000.00	No Check	30 Days
SAM001	RE	Samanthas Diner			Durban	45 000.00	No Check	30 Days
DAN001	IT	Danny Storm IT Cafe			Durban	75 000.00	No Check	30 Days
PAN001	RE	Panda Copiers			Durban	50 000.00	No Check	COD
HAC001	IT	Hack PC - IT Shop			Durban	0.00	No Check	COD
PIN0001	GV	Pink Shoes			Durban	0.00	Terms and Limit	30 Days
GIL000001	GILLTTSPA	Dolf Lundgren			Durban	0.00	Terms and Limit	COD
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00	Terms and Limit	COD
JUS001	RE	Just In Time			Durban	50 000.00	No Check	30 Days
LIT0001	RE	Little Bee Honey			Durban	0.00	Terms and Limit	
GRE001	RE	Green Tea Supplies			Durban	75 000.00	Terms and Limit	30 Days
FIN0001	RE	Fine Hair Salon			Durban	0.00	Terms and Limit	COD
BET0001	RE	Betties Summer Shop a...			Durban	0.00	Terms and Limit	
blancad	RE	North West Branch			Durban	0.00	Terms and Limit	COD
DAN002	IT	Dancing Shoes			Durban	10 000.00	No Check	COD
BIG0001	CO	Big Bargains			Durban	10 000.00	Terms and Limit	COD
MAN0001	RE	Mandy Norton			Durban	0.00	Terms and Limit	COD
DAN0003	IT	Dance Shoes			Durban	0.00	Terms and Limit	
BIL0001	CO	Billys Barn			Durban	0.00	Terms and Limit	COD
ANO0001	ACC	Another new customer			Durban	0.00	Terms and Limit	
APP0001	RE	Apple Juice Inc	Sales	Sales Department	Durban	0.00	Terms and Limit	

Open Windows


24 Apr 2018

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.



Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

+

✗

✗

Workspaces

Export

Durban

Refresh

Process

Format

Export

Current

Links

Enter text to search...

Functions

Technical Specifications

Additional Data

Documents

WO History

Failure Analysis

Warranty

Maintenance Methodology

Locations

Forest Hills Centre

Pine Willows Centre

Jolly Farm Centre

Silver Birch Centre

Lilies Quarter Centre

NewHopeMail

NON CLIENT BPOV2 TEST

BPO2 TEST 1

BPO2 Test 7

BPO2 Test 2

BPO2 Test 3

BPO2 Test 4

Kloof Corner Mail

WaterCrest Village Mail

Bothas Hill

Open Windows

24 Apr 2018

- The ***Maintenance Methodology for location: []*** screen will be displayed.
- Click on ***Add***.

Maintenance Methodology for location : Forest Hills Centre - BPO: Version 2.1.0.56 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Refresh

Processing Format Current

Drag a column header here to group by that column

TaskNum	TaskDesc	ScheduleTy...	MeterCode	Units	ServiceEvery	MaxBoundary	MinBoundary	LastPerfDate	NextP
TT002	Weekly - Call per WO	Time		w	1.00	0.00	0.00	19 Feb 2017	26 Feb
TT070	2 Daily - Call per WO	Time		d	2.00	0.00	0.00	07 Apr 2017	09 Apr
TT026	Monthly - Generate Project	Time		m	1.00	0.00	0.00	11 Mar 2017	11 Apr
TT0001	Daily - Call per WO	Time		d	1.00	0.00	0.00	11 Apr 2017	11 Apr
WS	Weekly Service	Time		w	1.00	0.00	0.00	19 Jun 2017	19 Jun
Tier	Commercial Tier Test	Time		m	1.00	0.00	0.00	19 Jun 2017	19 Jun
TT067	Yearly, Mono 1000 - WO Only	Time		yyyy	1.00	0.00	0.00	19 Jun 2017	19 Jun

Open Windows 24 Apr 2018

- Follow the steps in the [Assets: Assign A Task](#) manual to complete this process of assigning a maintenance task schedule to a ***location***.

MNU.112.004