

# 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*.

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<b>.</b> '			Contract	Listing - BPO: W	ersion 2.1.0.56 - Exampl	e Company			8	X
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	C0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Depar
	C00000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Depar
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e nerestrate M	C00000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Depar
	C00000042	CPC	Main	H0P001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
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Server a restary	C00000044	CPC	Main	BOT0001	Bothas Networking Inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Depar
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Credit Notes	10									



#### 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.



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			biancad	RE	North We	st Branch				Durban		0.00	Terms and Limit	C00	
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			MAN0001	RE	Mandy No	rton				Durban		0.00	Terms and Limit	C00	
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			APP0001	RE	Apple Juic	te Inc	Sales	Sales Depart	ment	Durban		0.00	Terms and Limit		
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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.



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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