We are currently updating our site; thank you for your patience.

CONTRACT

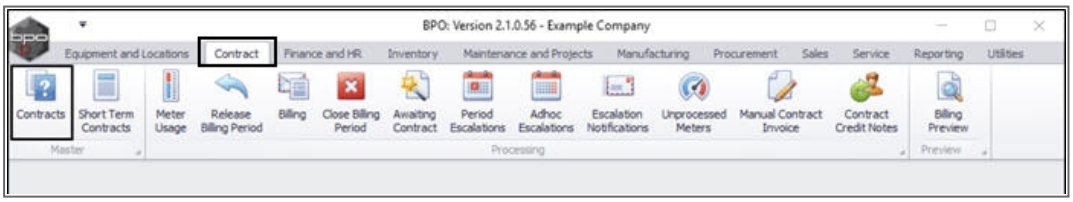
CONTRACTS – SCHEDULED MAINTENANCE TASKS

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.

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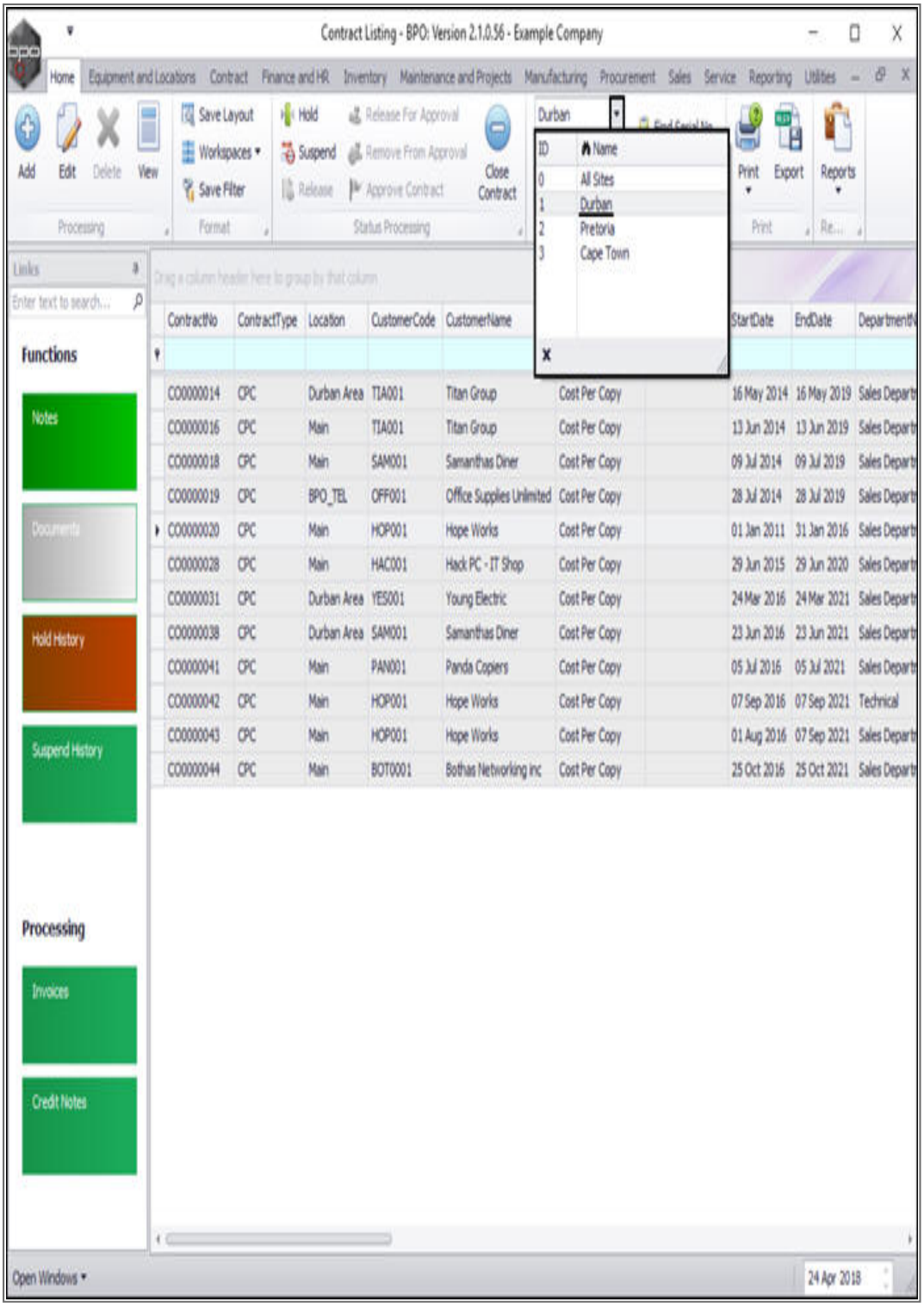

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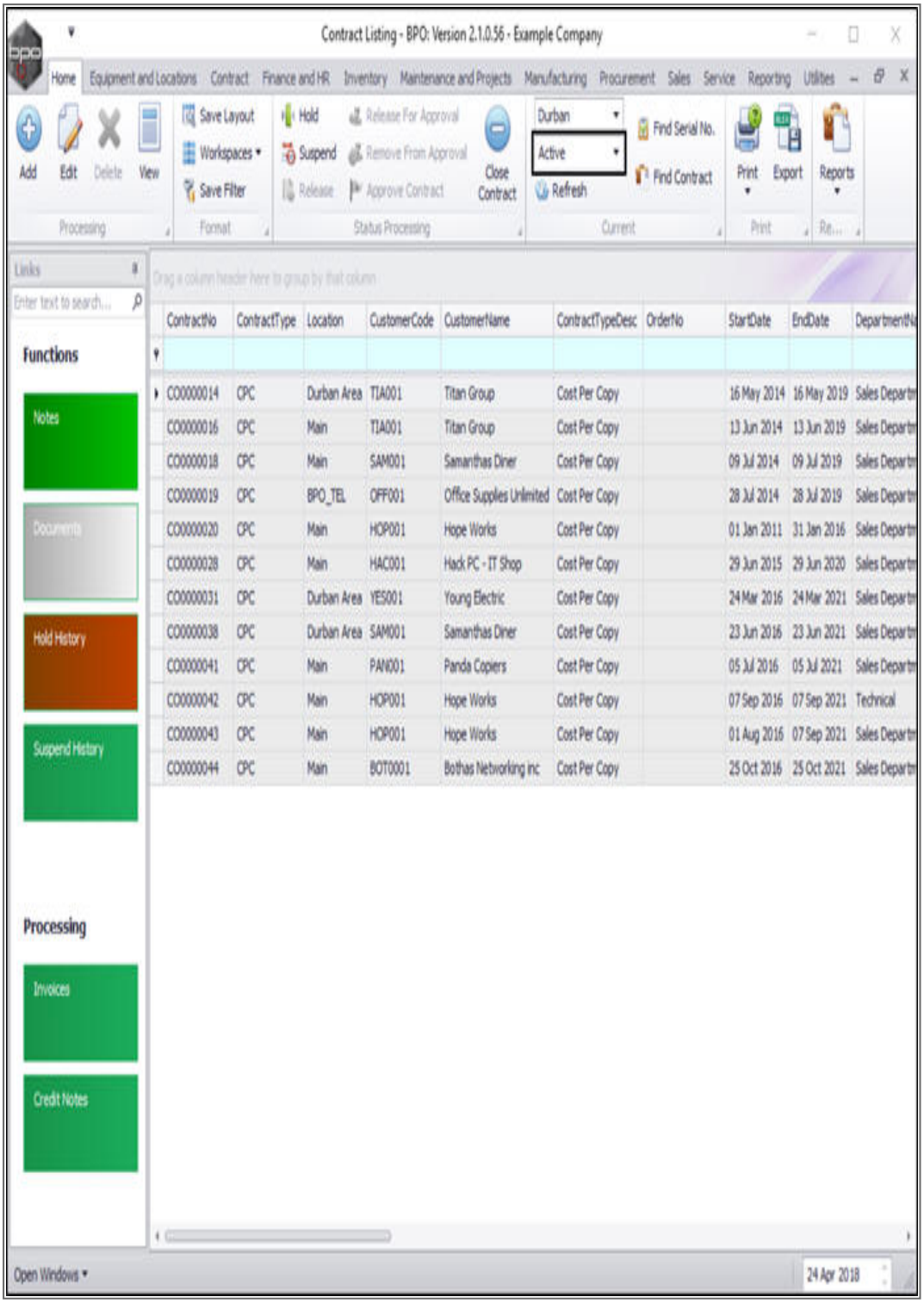
- By default, this screen will list all the **Active** contracts for the selected site, select an **alternative** status, if required.



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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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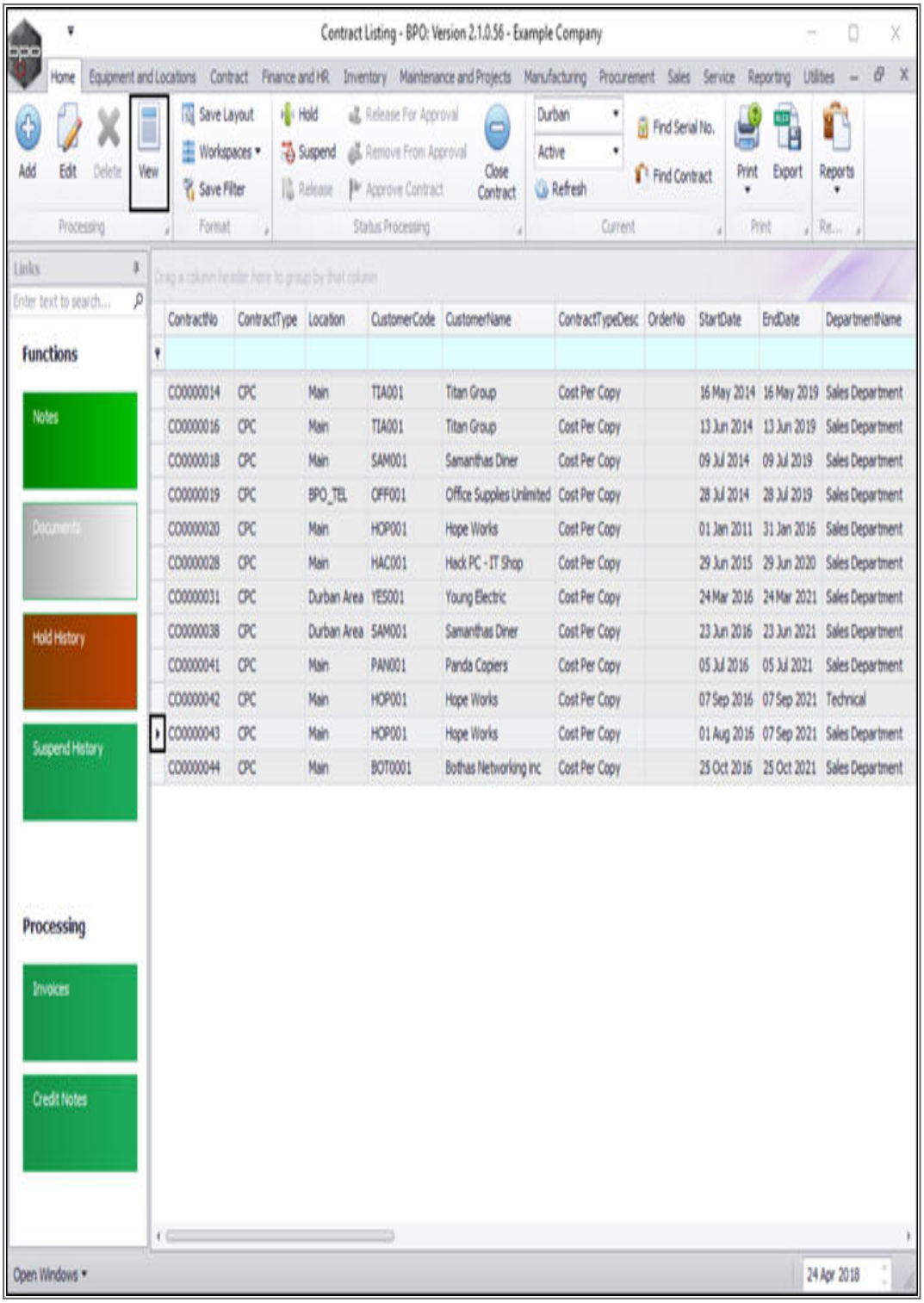

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NOTE THE SERIAL NO.

- 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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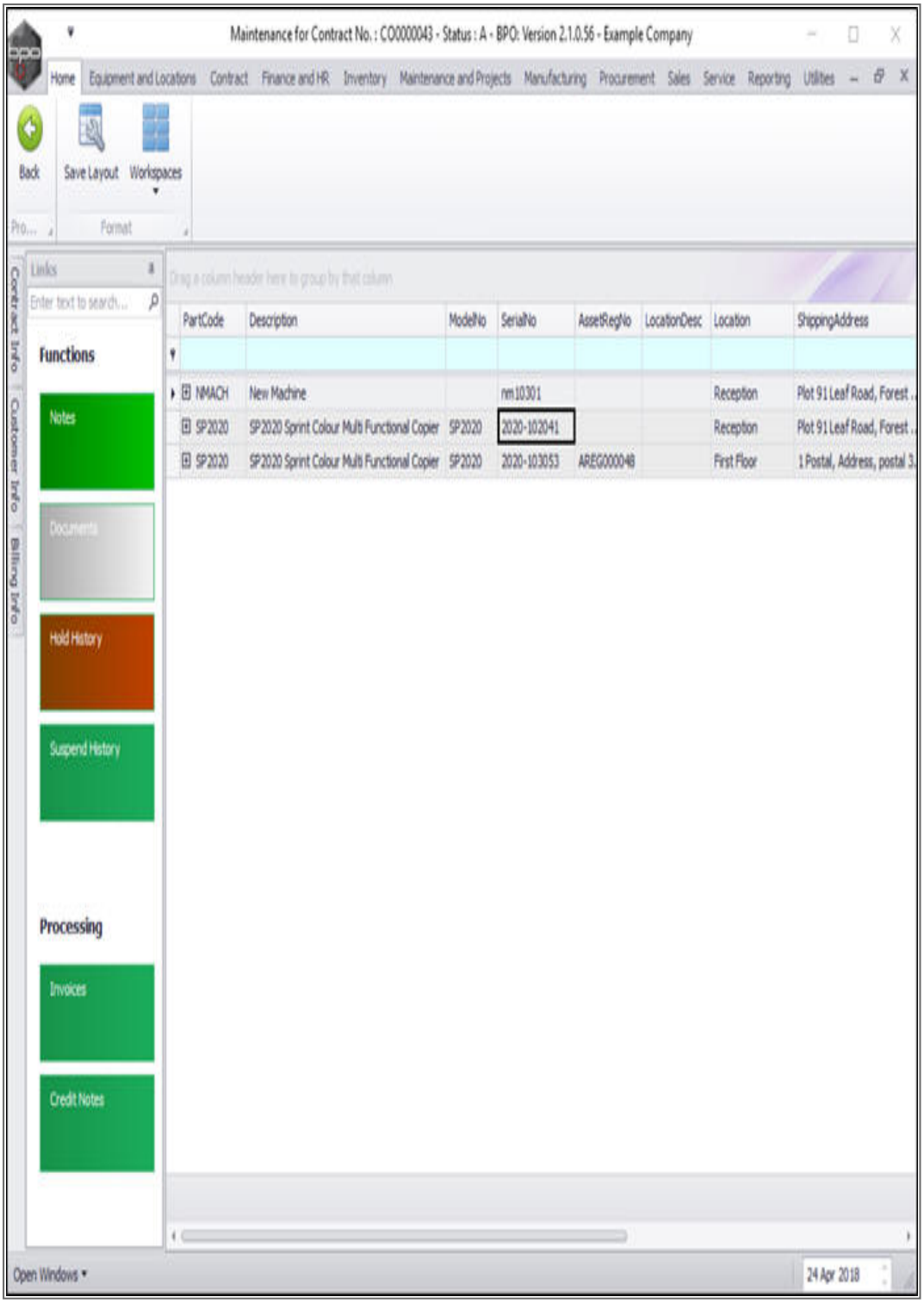

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NAVIGATE TO THE ASSETS LISTING SCREEN

- 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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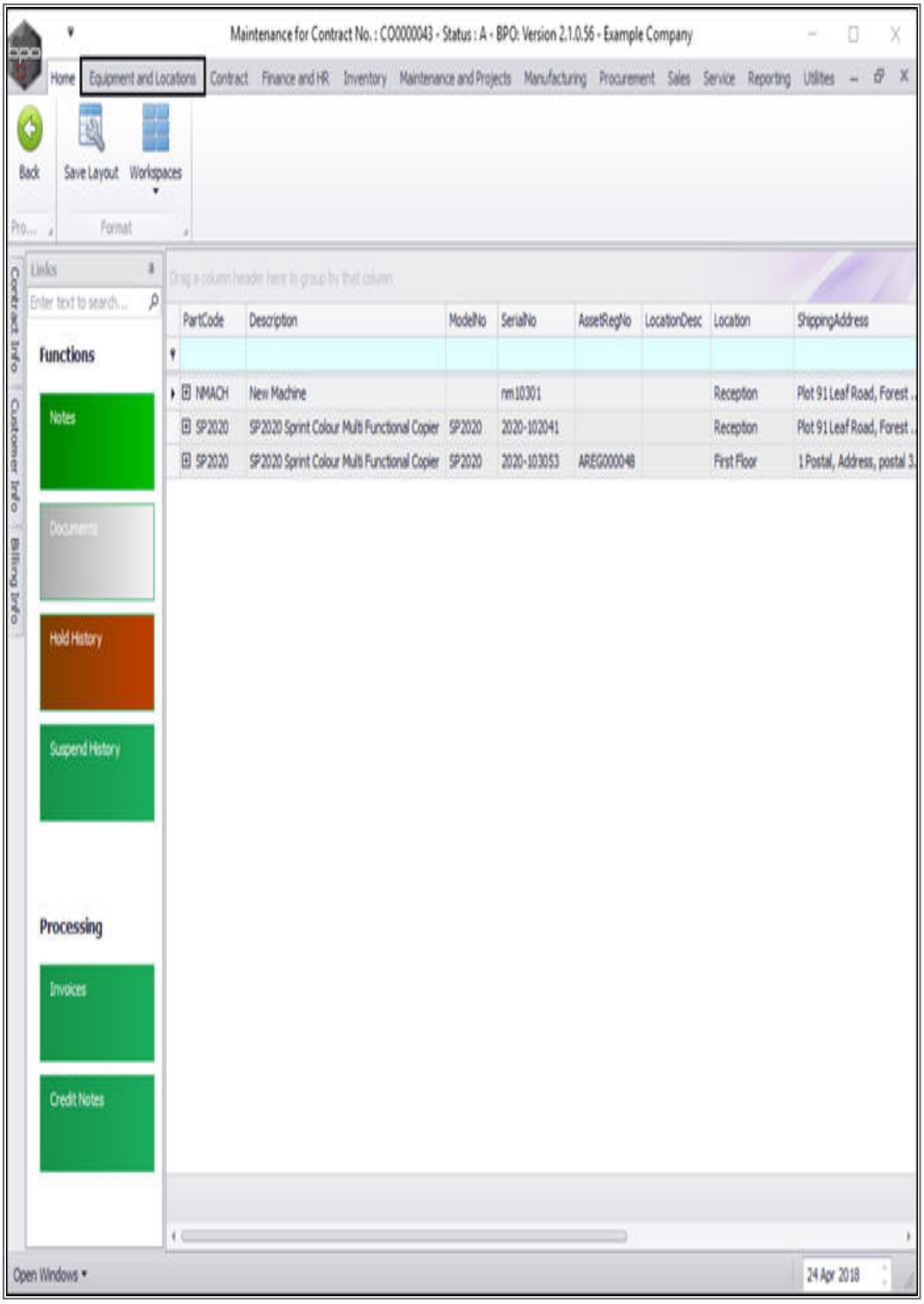

- Click on **Assets**.

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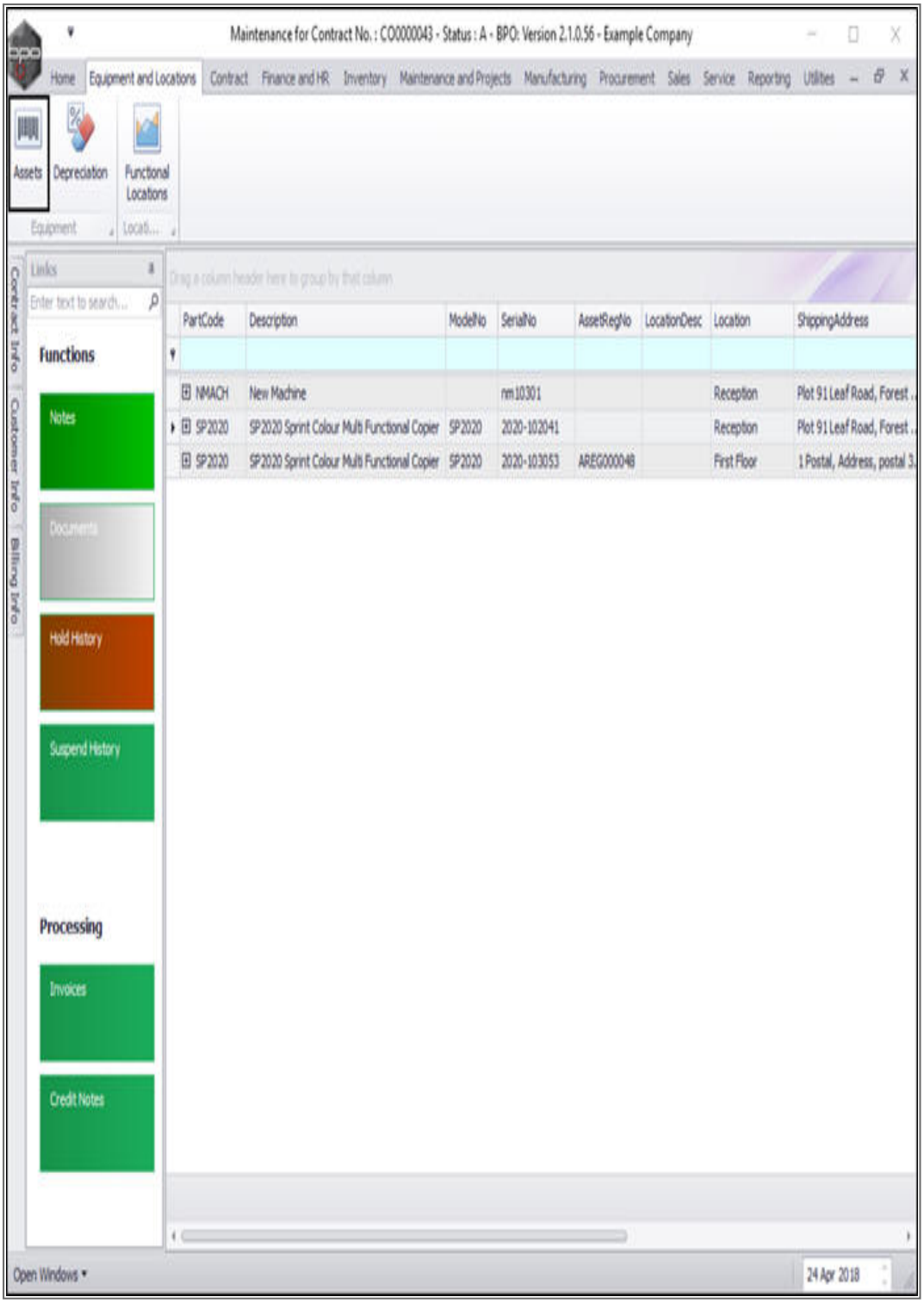

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- The **Machine List for [ ]** screen will open.
- Use the filter row to type in and search for the serial no. noted in the previous step.

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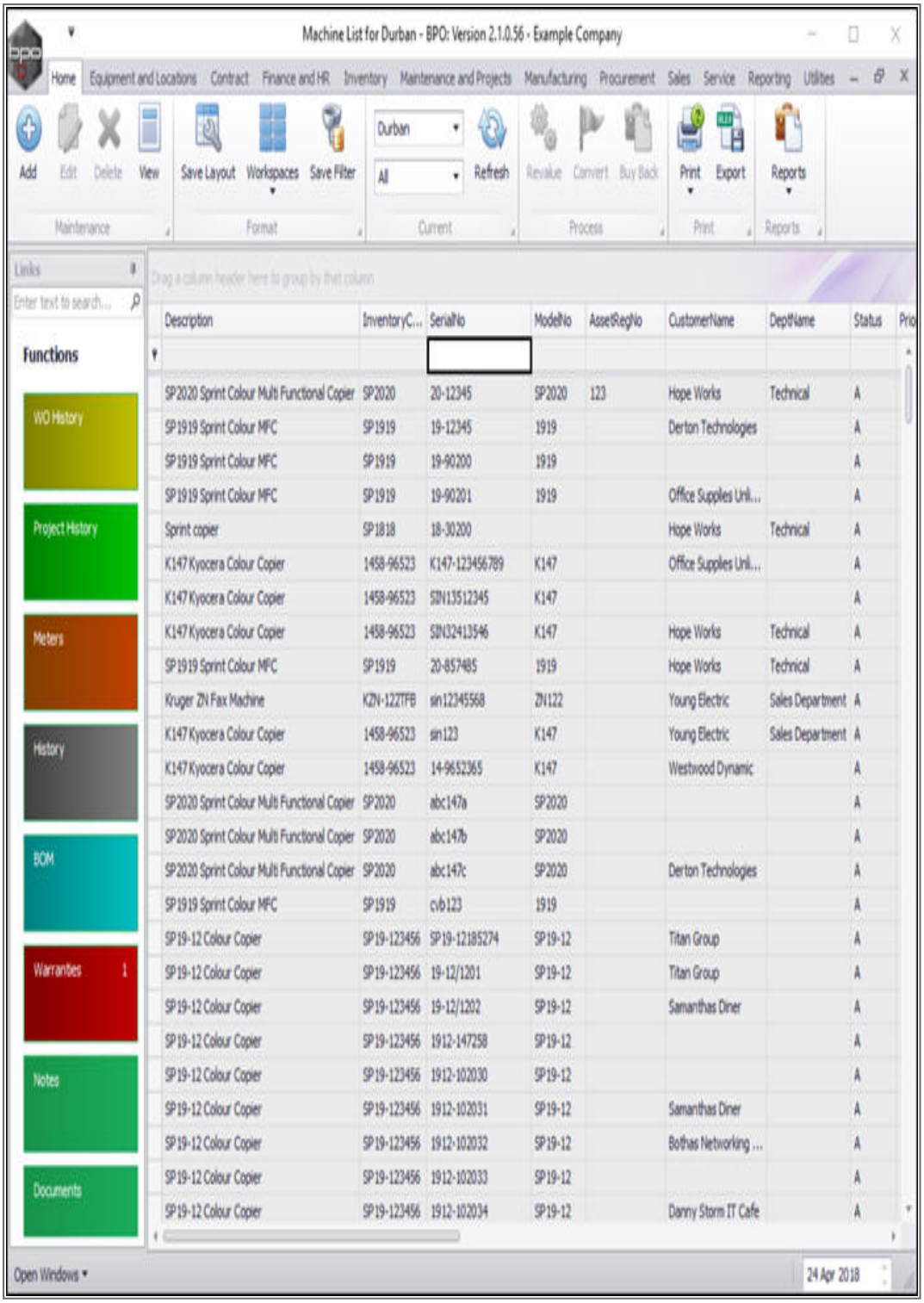

- You can now view your initially selected machine.

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SELECT MACHINE

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

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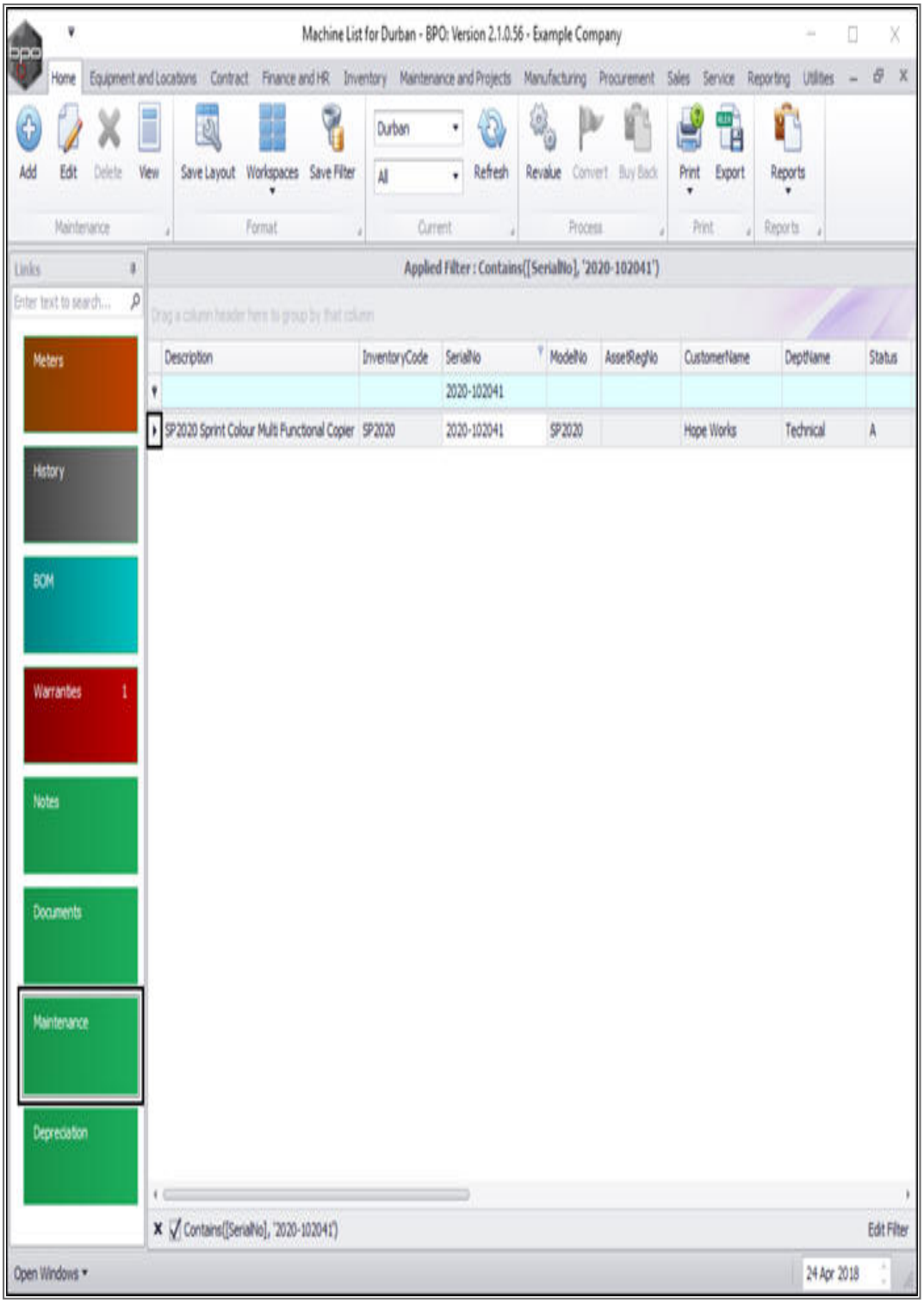

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ASSIGN A TASK TO THE MACHINE

- 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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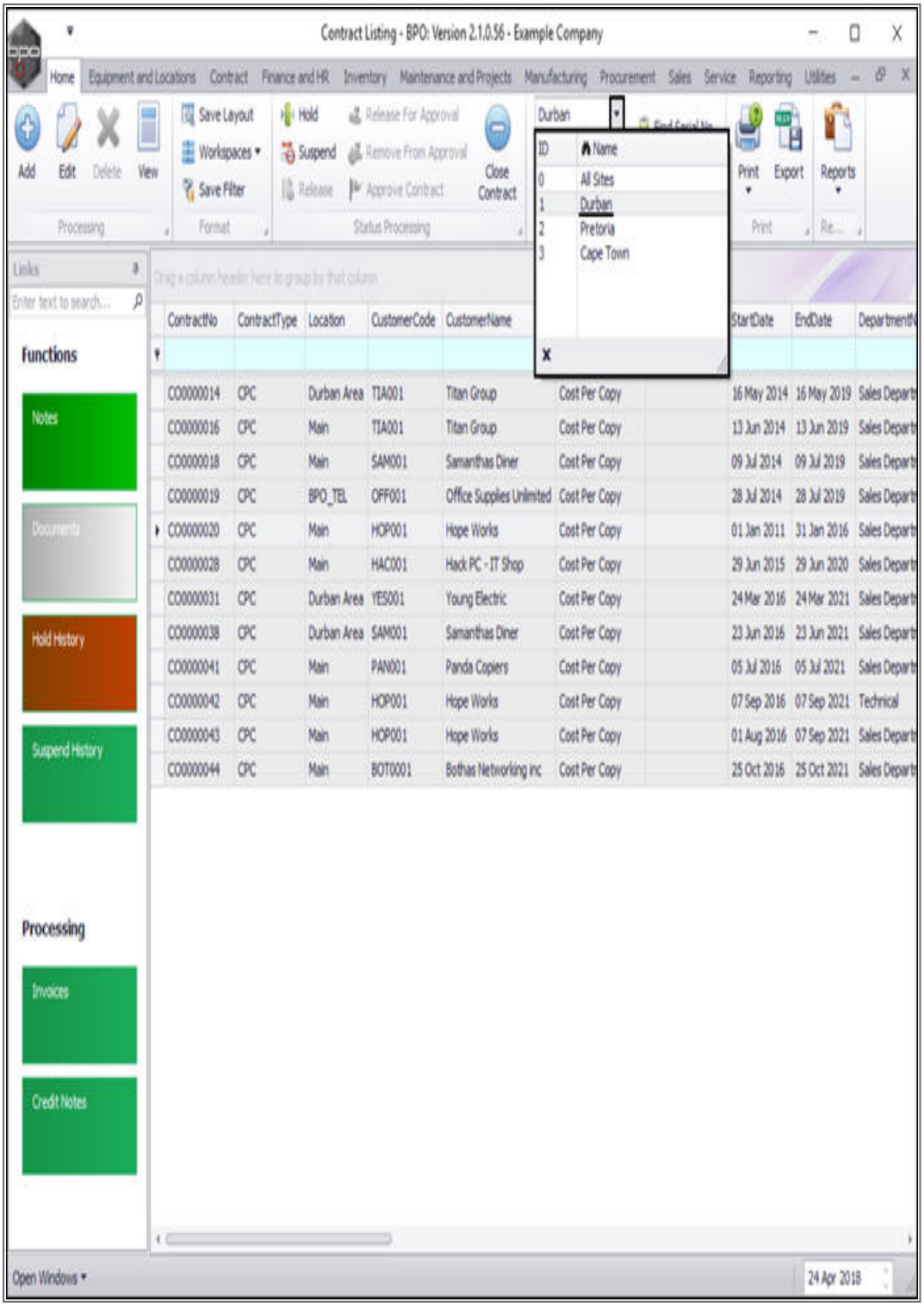

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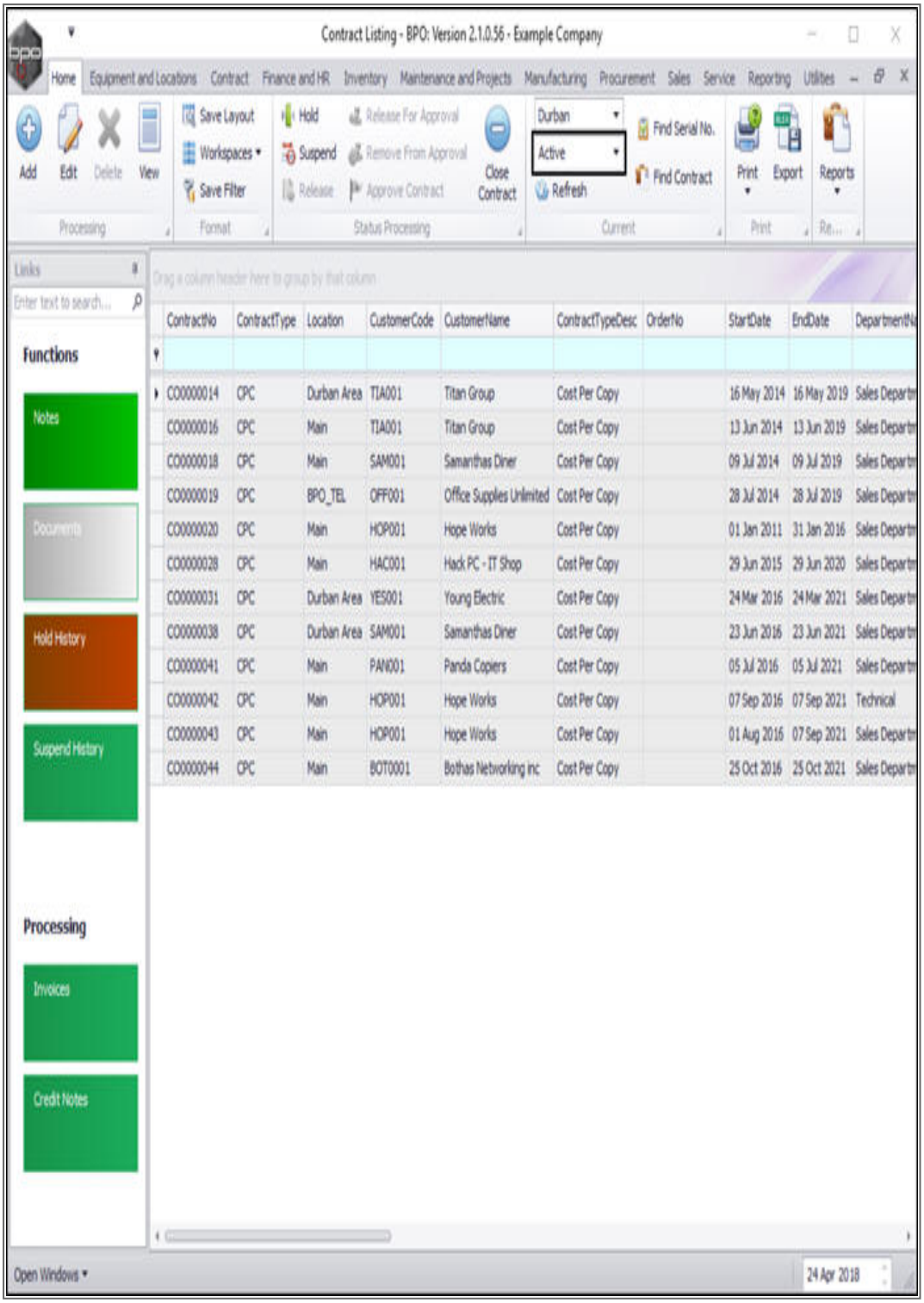
- By default, this screen will list all the **Active** contracts for the selected site.



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

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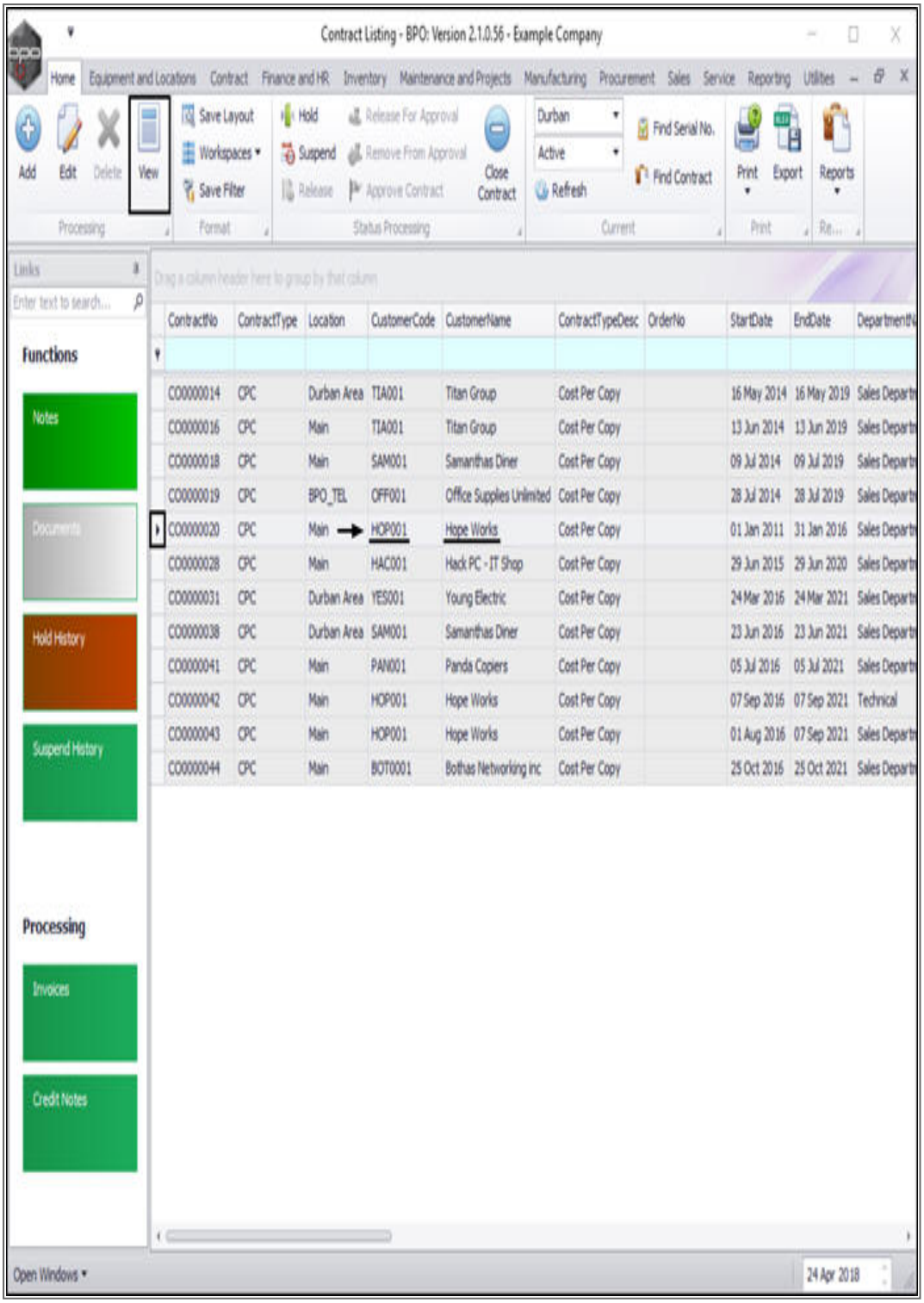

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NOTE THE LOCATION DESCRIPTION

- 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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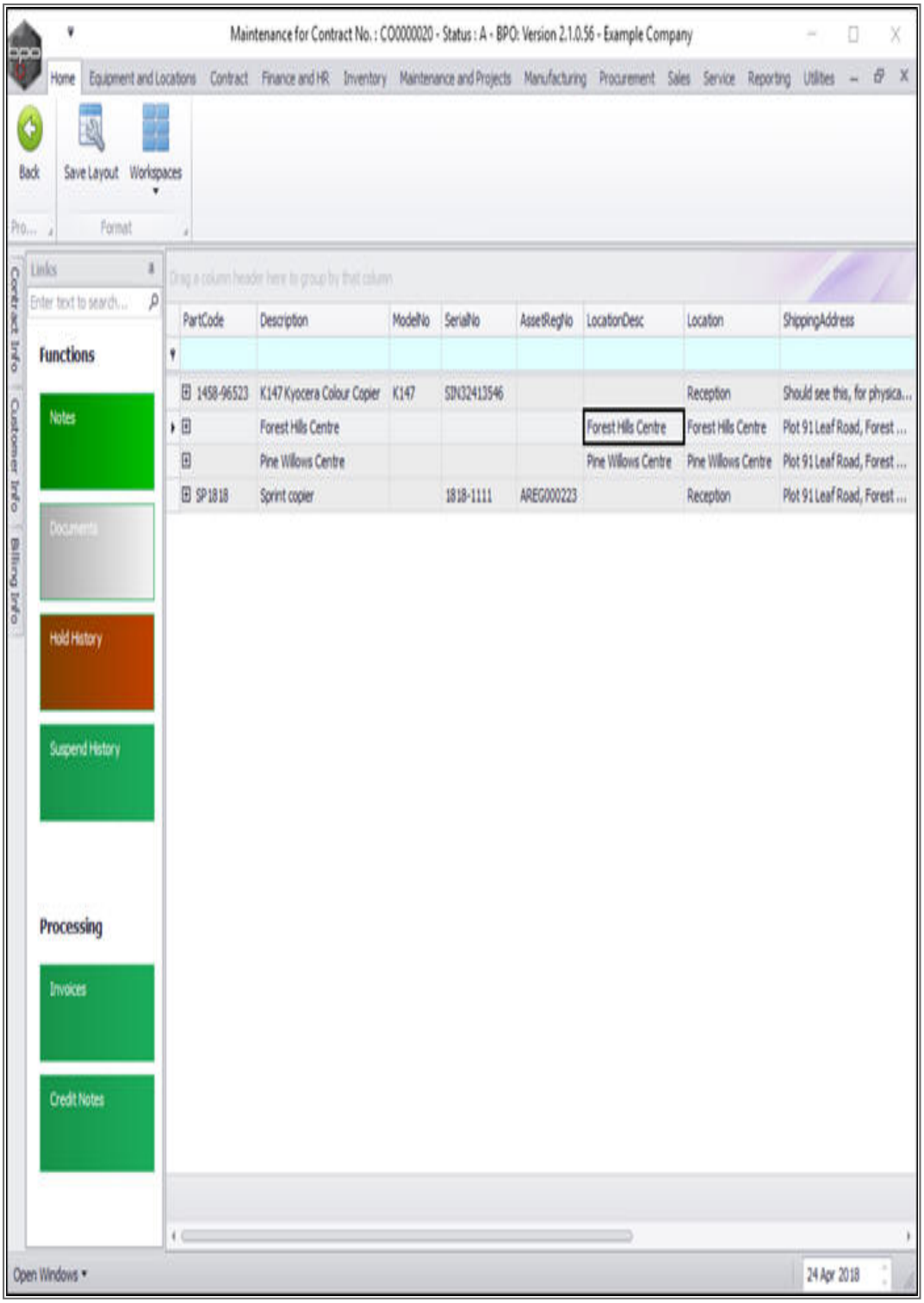

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NAVIGATE TO CUSTOMER LOCATIONS

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

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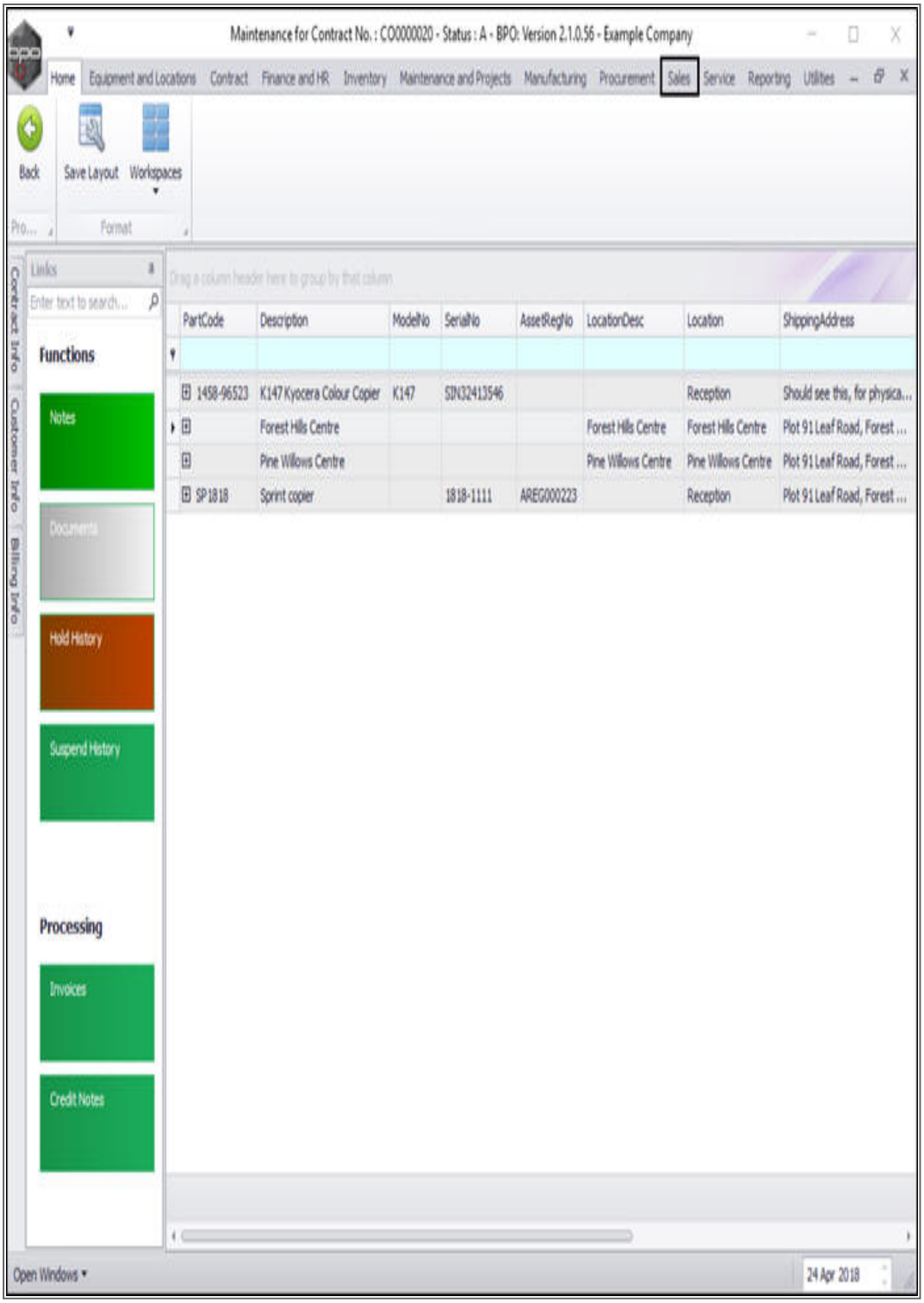

- Click on **Customers**.

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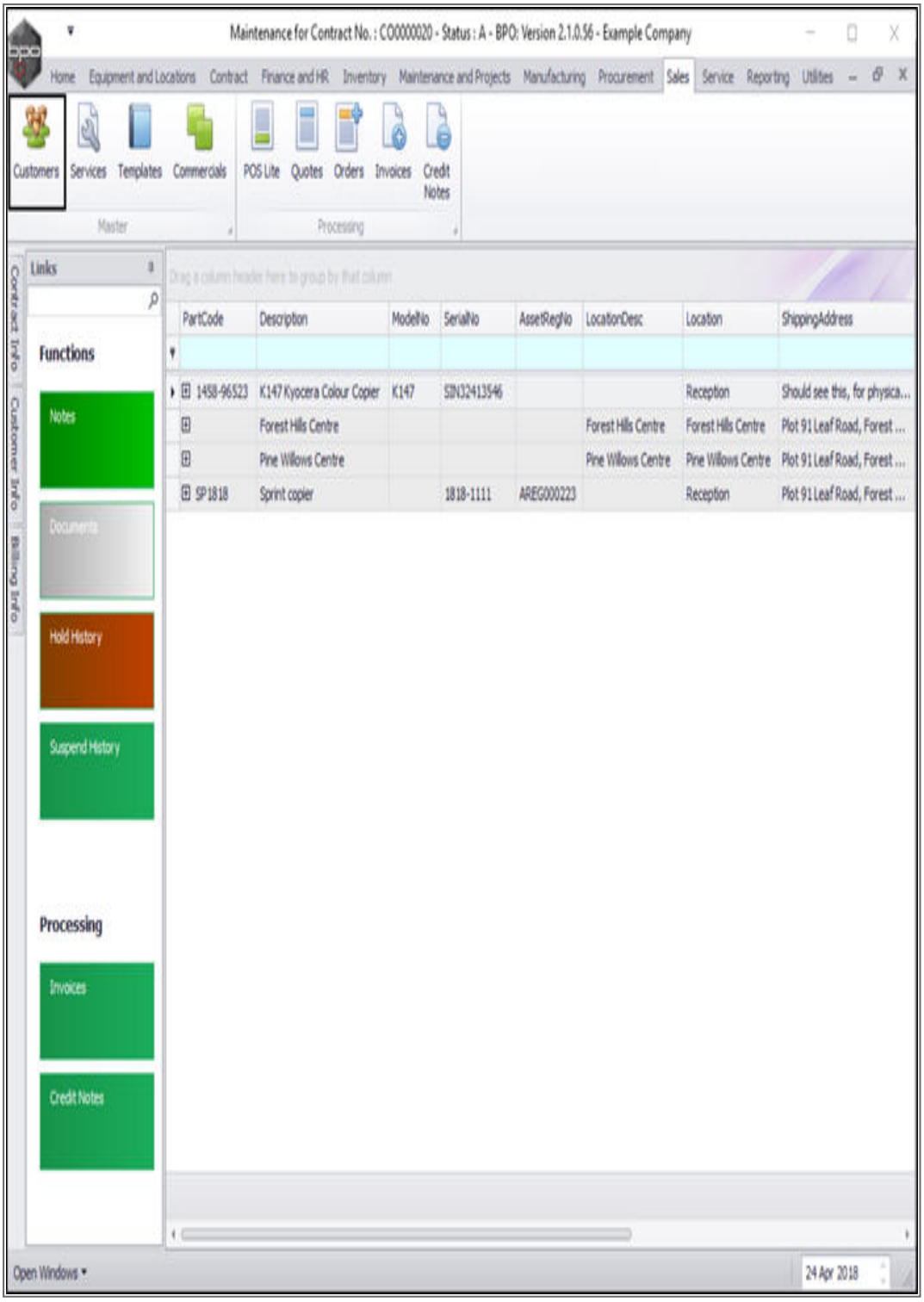

- In this module, ensure that your screen is set to the correct **Site**.
- Ensure that you are in the **Active** status.

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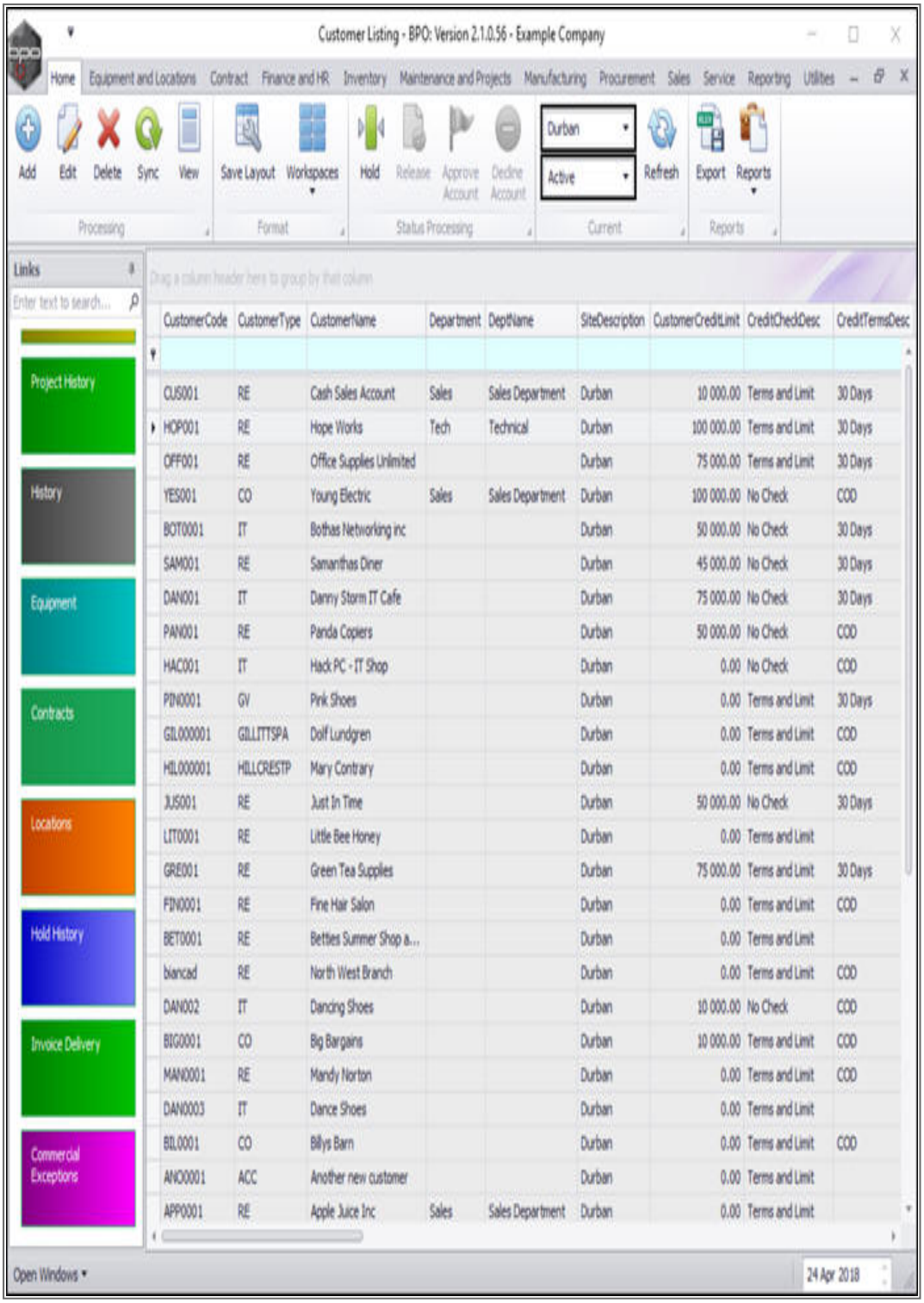

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SELECT CUSTOMER

- 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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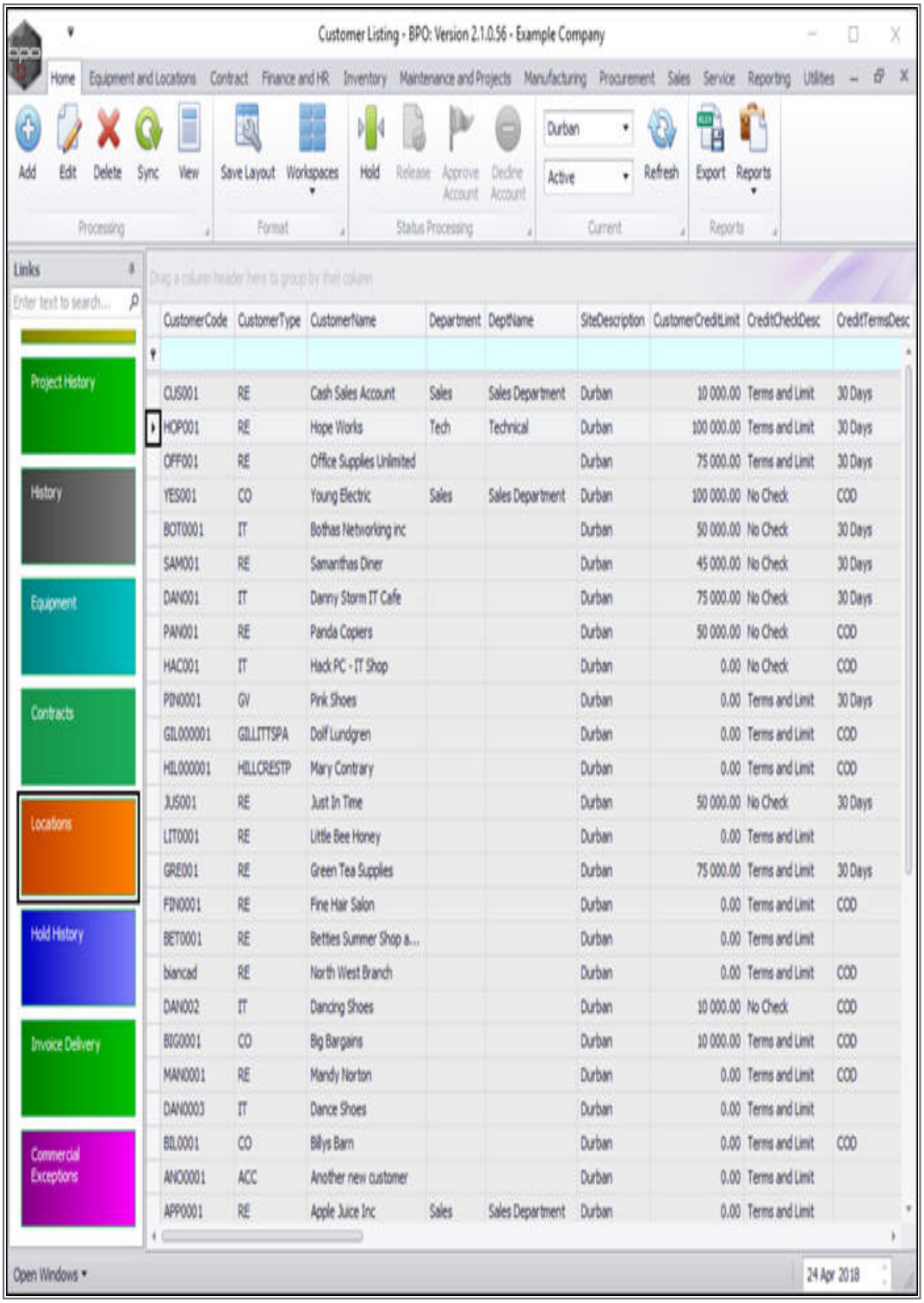

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SELECT LOCATION

- 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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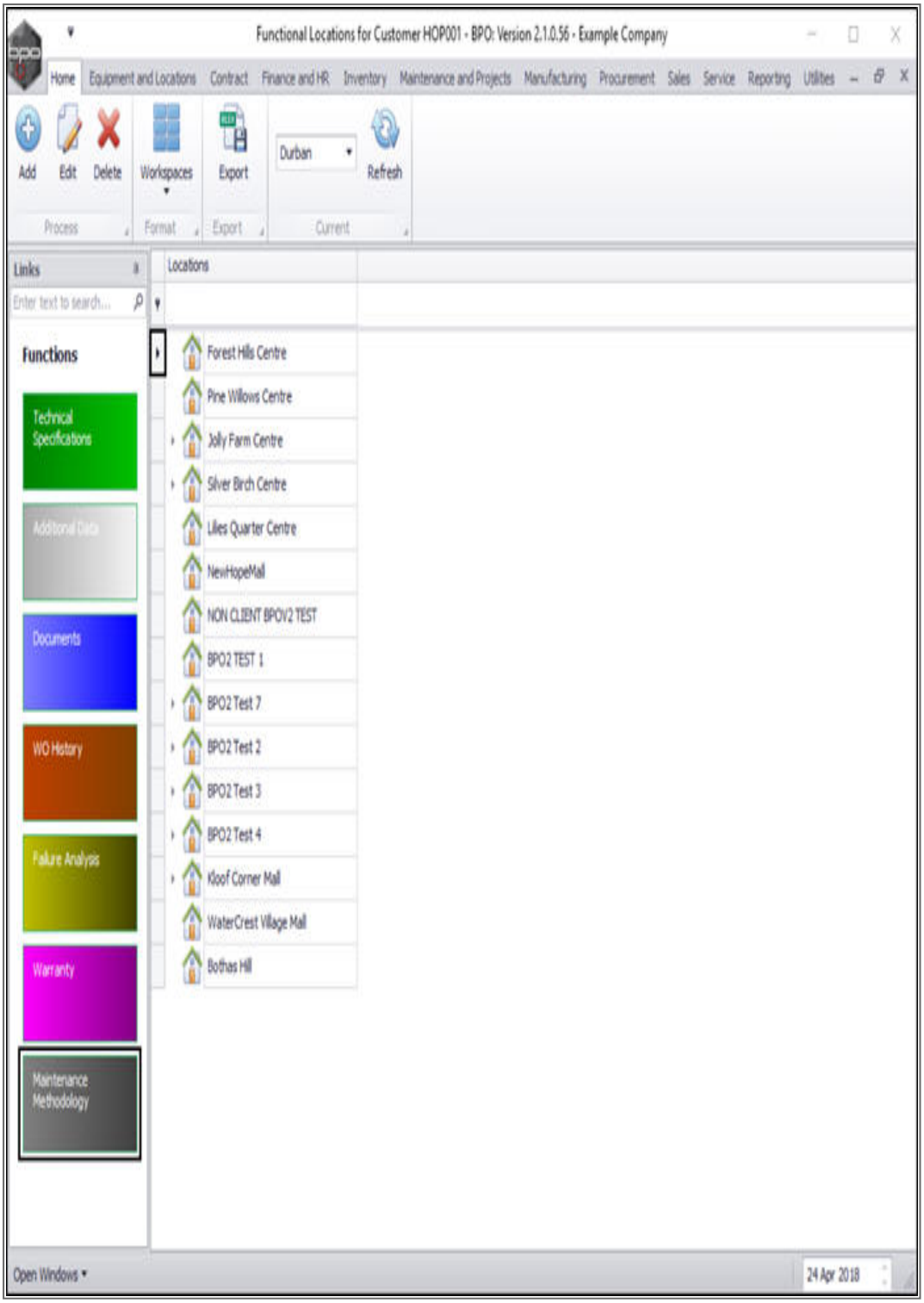

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- The **Maintenance Methodology for location: []** screen will be displayed.
- Click on **Add**.

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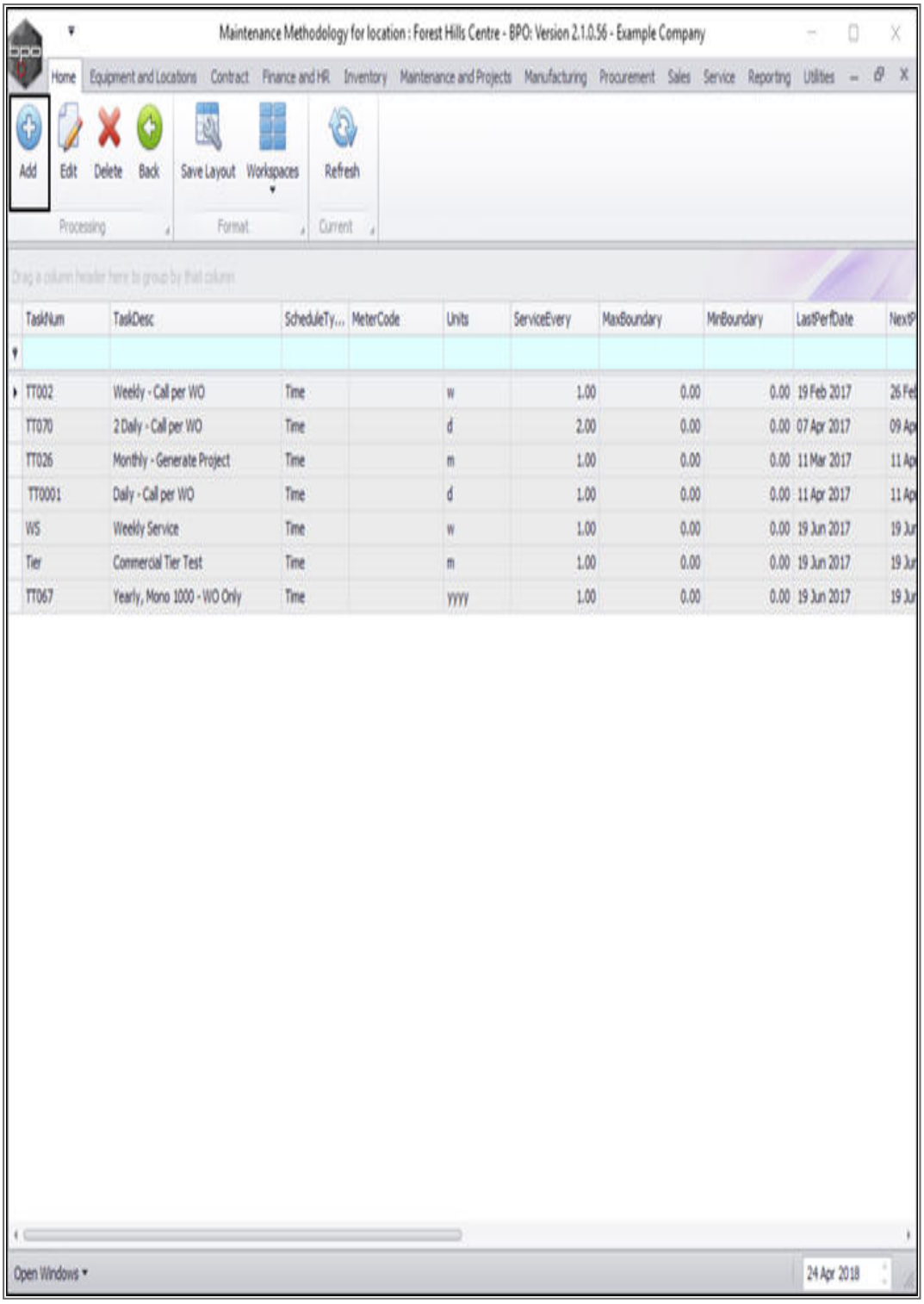

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- Follow the steps in the Assets: Assign A Task manual to complete this process of assigning a maintenance task schedule to a **location**.

MNU.112.004

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