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

PROJECTS

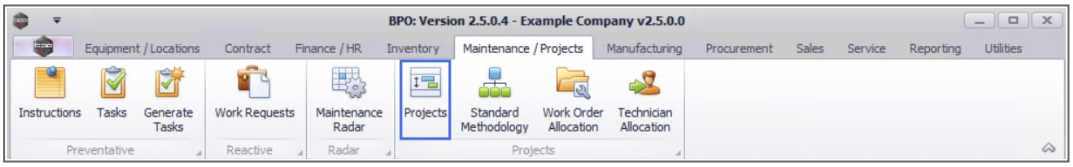
WORK ORDERS - LINK CUSTOMER CONTACT

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**.

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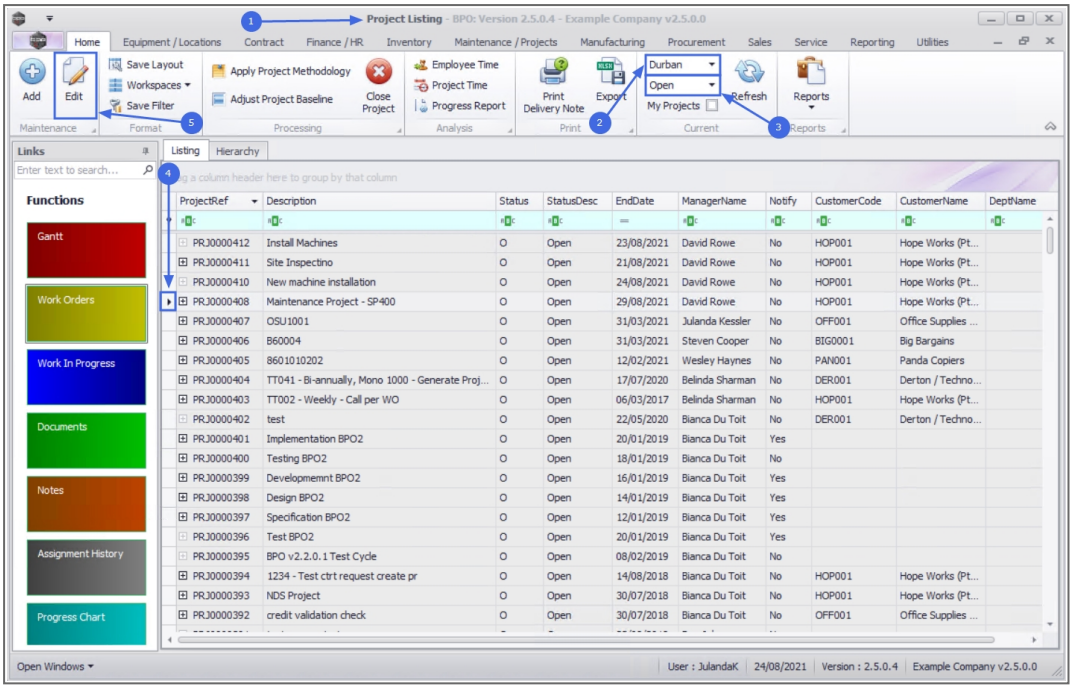

6. The **Edit project : [**project ref number**]** screen will be displayed.
7. Click on the **Linked Work Orders** tab to display the Linked Work Orders panel.
8. Click in the **row** of the work order you wish to link a customer contact to.

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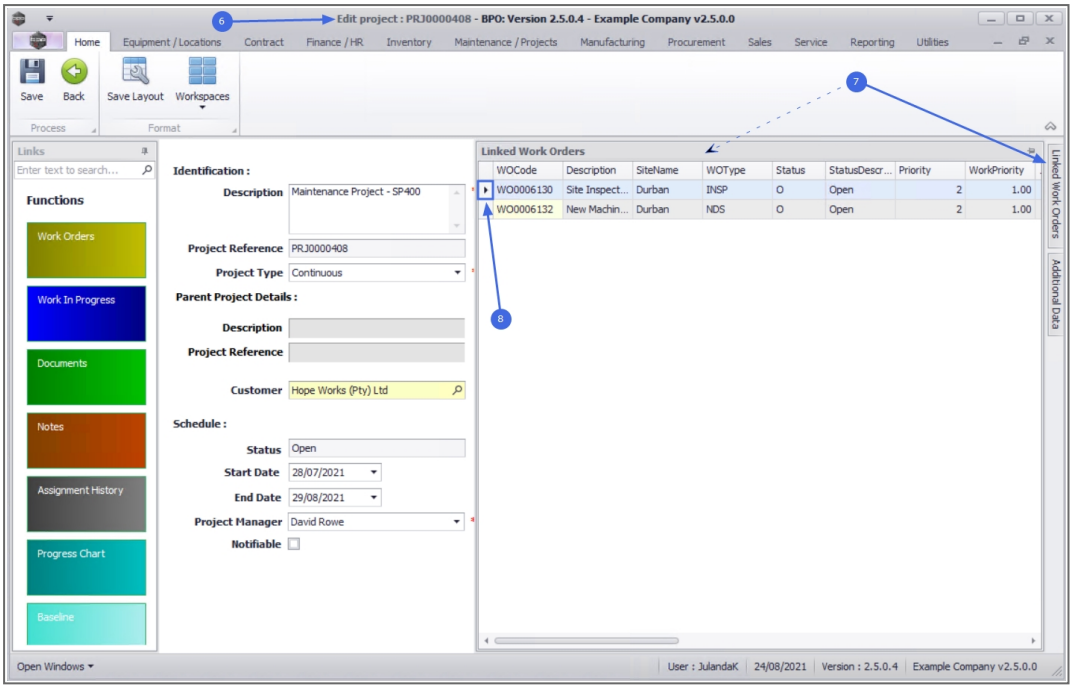

9. Use the **scroll bar** at the bottom of the Linked Work Orders panel to scroll until you can see the **Contact Name** field.
10. Click in the **Contact Name** field of the selected work order row to display an **ellipsis** button.
11. Click on this button to display the **Select a contact for this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

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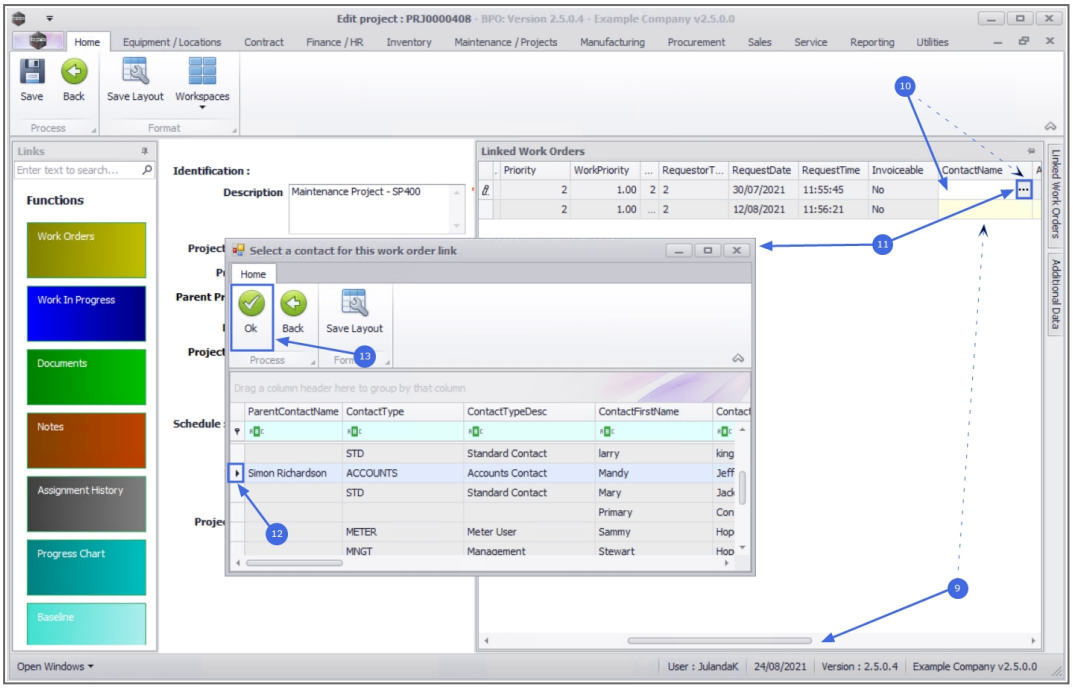
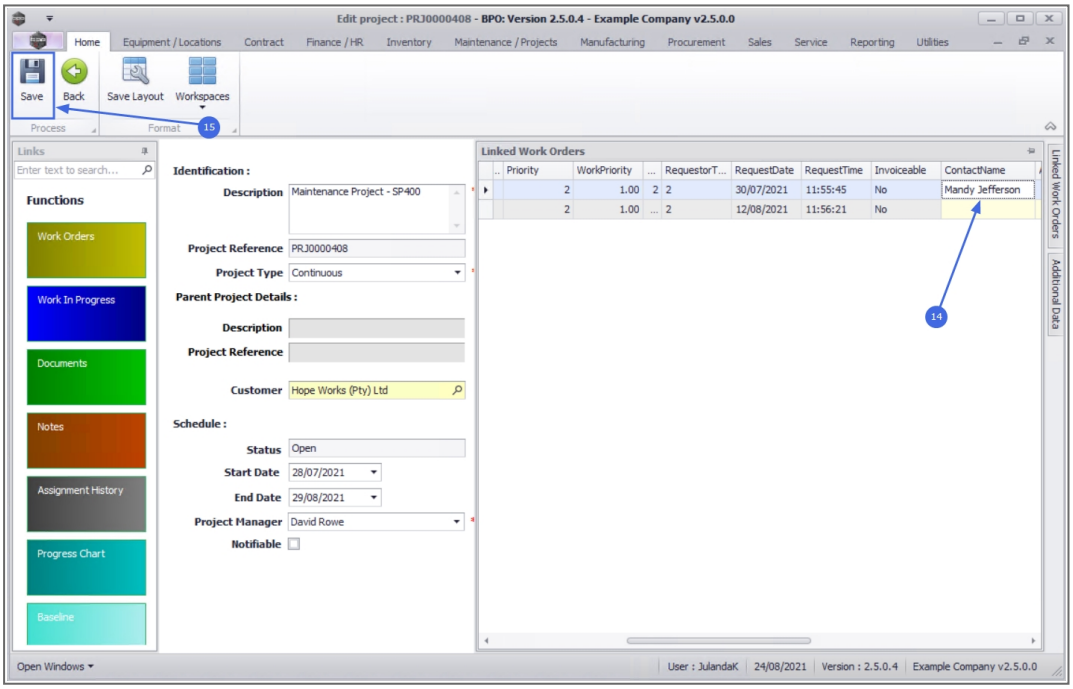


14. You can now view the **selected contact** in the **Contact Name** field.
15. Click on **Save**.



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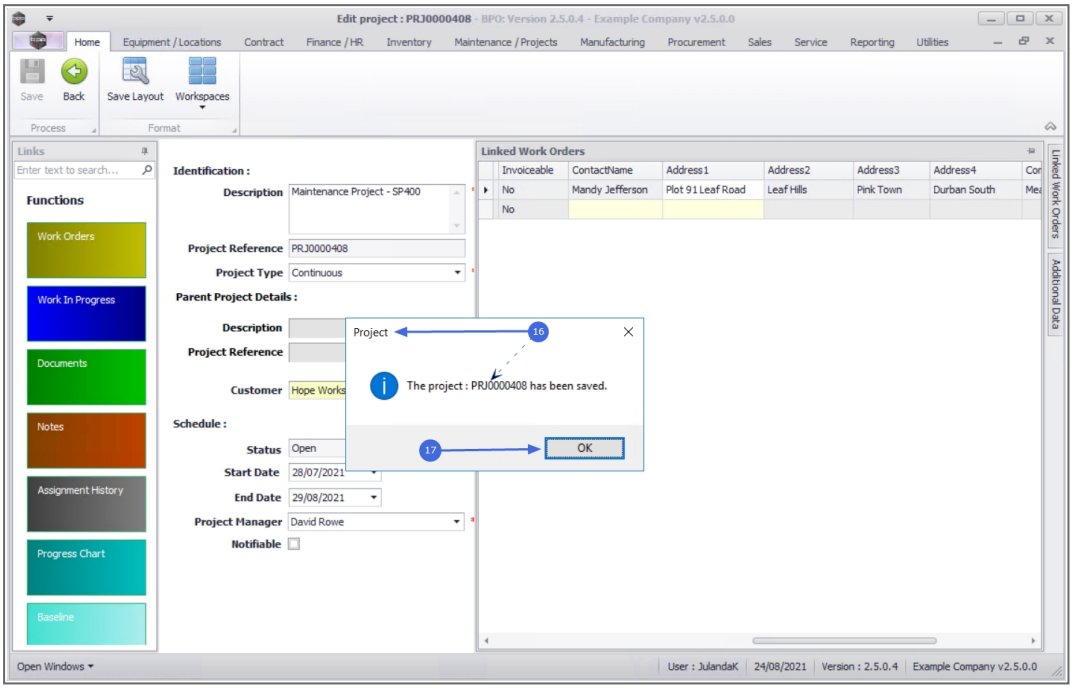
16. When you received the **Project** message to confirm;
    - **The project: [**project ref number**] has been saved.**
17. Click on **OK**.



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