

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

# CONTRACT

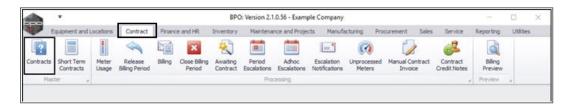
## CONTRACTS - SCHEDULED MAINTENANCE TASKS

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.



A 1				Contract	Listing - BPO: V	ersion 2.1.0.56 - Exampl	le Co	ompany		- (	a x
Home Equipment an	dlé	cations Cont	ract Finance a	ndHR Inver	ntory Maintena	nce and Projects Manu	fact	uring Procurement Sales Ser	vice Reporting	Utites	_ & x
Add Edit Delete We Processing		Carl Save Li Worksp Save Fi Format	ayout 📲 H aces • 😽 5 Iter III A	told 💰 iuspend 🚜 luticase (Pr	Release For Appr Remove From Ap Approve Contrac itus Processing	oval 😑 🗖	irbar	<b>—</b>		i r	
Links Ø						3		Cape Town			
Enter text to search P		ContractNo	ContractType			CustomerName			StartDate	EndDate	Department
Functions	+	COURDERA	coneactrype	Lordon	custome code		ĸ		ovar undie	C MUGIC	Urchai arrier
ruicoviis	Ê	000000014	me	Dahar Isa	114004	100 10	-	and Dave Comm	10 10 - 2014	12 14-1 2010	Calue Dana
Notes		C00000014	090	Durban Area		Titan Group		lost Per Copy		16 May 2019	
		C00000016	000	Main	TIA001	Titan Group		ost Per Copy		13 Jun 2019	
		C00000018 C00000019	CPC	Main ma	SAM001	Samanthas Diner		ost Per Copy	09 34 2014	09 3./ 2019	Sales Depar
Documents	ł.		090	BPO_TEL	OFF001	Office Supplies Unlimited			28 34 2014	28 Jul 2019 31 Jan 2016	Sales Depar
Address of the	Ľ	C00000020	CPC	Main	HOP001	Hope Works		ost Per Copy			
		C00000028	00	Main Durban Area	HAC001	Hack PC - IT Shop		ost Per Copy		29 Jun 2020 24 Mar 2021	
CONSIGNATION OF THE OWNER OF THE		C00000031 C00000038	OPC OPC			Young Electric Samanthas Diner		ost Per Copy ost Per Copy			ALCONT DURING
Hold History				Durban Area				100.000 M		23 Jun 2021	
		C00000041	090	Main	PAN001	Panda Copiers		ost Per Copy		05 34 2021	Sales Depar
		C00000042	OPC OPC	Main	HOP001	Hope Works		ost Per Copy		07 Sep 2021	
Suspend History		C00000043		Main	HOP001	Hope Works		ost Per Copy	- Alexandra	07 Sep 2021	
		C00000044	CPC	Main	BOT0001	Bothas Networking Inc	0	ost Per Copy	25 Oct 2016	25 Oct 2021	Sales Depar
Processing Invoices											
Credit Notes	7				_						
		-									



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

A 1				Contract	Listing - BPO: V	/ersion 2.1.0.56 - Example	e Company			老(二)	X
Home Equipment an	ndia	cations Con	tract Finance	and HR Inve	ntory Maintene	ance and Projects Manuf	lacturing Procurem	ent Sales Serv	ice Reporting	g Utilities	- 8 )
ABVI		Save L	ayout ң	Hold 🚜	Release For App	roval 🔒 🗖	rban •	Find Serial No.		A 🐽	
· · · · ·		Works;	aces • 👸	Suspend 💰	Remove From Ap	aproval 🔰 🗛	tive •	The serie no.	Alexandre da	8 🕛	
Add Edit Delete W	en	Save F	iter IL	Release P	Approve Contrac	cl Contract 🐝	Refresh	Find Contract	Print Exp	port Report	1
Processing		Fornal		- N.	itus Processing		Current	-	Print	, Re	
Links #	Ī.	1.5	172 3								
Enter text to search P										1	1
201 - 82		Contractivo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	Departmen
Functions	٩										
Notes	۲	C0000014	OPC	Durban Area		Titan Group	Cost Per Copy			16 May 2019	
(notes)		C00000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	
		C0000018	090	Main	SAM001	Samarithas Diner	Cost Per Copy		09 34 2014	09 34 2019	Sales Depar
		CO0000019	OPC	BPO_TEL	OFF001	Office Supples Unlimited			28 3/ 2014	28 3/ 2019	Sales Depar
Boarrinte		C0000020	090	Main	HOP001	Hope Works	Cost Per Copy			31 Jan 2016	
		C0000028	090	Main	HAC001	Hack PC - IT Shop	Cost Per Copy				Sales Depar
		C0000031	090	Durban Area		Young Electric	Cost Per Copy			24 Mar 2021	
Hold History		C0000038	CPC	Durban Area	100100	Samanthas Diner	Cost Per Copy			23 Jun 2021	
	-	C00000041	090	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 34 2021	Sales Depar
		C00000042	CPC	Main	HOP001	Hope Works	Cost Per Copy			07 Sep 2021	
Suspend History		C0000043	090	Main	HOP001	Hope Works	Cost Per Copy		Children of the	07 Sep 2021	
		C00000044	CPC	Main	8070001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Depa
Processing											
Invoices											
Credit Notes											
	1	6									
Ipen Windows *										24 Apr 20	18



## **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.

Help v2024.5.0.7/1.0 - Pg 4 - Printed: 21/08/2024



<b>h</b> •			Contract	Listing - BPO: V	ersion 2.1.0.56 - Example	Company			S	D X
Home Equipment a	d Locations Con	tract Finance a	nd HR Inver	ntory Maintena	nce and Projects Manuf	acturing Procurem	ent Sales	Service R	eporting Util	tei – di
ABVI	Save L	ayout 🧃 H	told 🚜	Release For Appr	roval 👝 Du	rban •	Find Serie		AD I	ê.
🔮 😧 🗙 🛛	Works	aces . 25	iuspend 💰	Remove From Ap		tve •	1 Pino Serv	a no.		•
Add Edit Delete V	ew 🦷 Save P		1.1	Approve Contrac	Close Contract	Refresh	Find Con	tract Print	Export	Reports
Processing	Forma	- 25		this Processing		Current		4 9	rint .	Ren a
inks 4	1									1
inter text to search P	Grag a solare he									
510-52-51	ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentNam
Functions	7									
-	C0000014	CPC	Main	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Departmen
Notes	C00000016	OPC .	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Departmen
	C00000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Departmen
	C00000019	OPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Departmen
Dourrents	C0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Departmen
	C0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Departmen
	C0000031	CPC	Durban Area	YE5001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Departmen
Hold History	C0000038	CPC	Durban Area	5AM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Departmen
	C00000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Departmen
	C00000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
Suspend History	• CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2015	07 Sep 2021	Sales Departmen
	C00000044	CPC	Main	B0T0001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Departmer
Processing. Invokes										
Credit Notes										
	(C			13						



#### 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.



	paces							
Links a	- Transminning							
Enter text to search $\beta$		Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
Functions	+							
	HOAMA E	New Machine		nm10301			Reception	Plot 91 Leaf Road, Fo
Notes	E \$P2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041			Reception	Plot 91 Leaf Road, Fo
	⊞ \$P2020	SP2020 Sprint Colour Multi Functional Copier	5P2020	2020-103053	AREG000048		First Floor	1 Postal, Address, po
Processing								



#### 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.



J Pornat Links	a Drag a columb							
Enter text to search	P PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
Functions								
	HI NMACH	New Machine		nm10301			Reception	Plot 91 Leaf Road, Fe
Notes	⊡ SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041			Reception	Plot 91 Leaf Road, Fo
	⊞ SP2020	SP2020 Sprint Colour Multi Functional Copier	5P2020	2020-103053	AREGODDO48		First Floor	1 Postal, Address, po
Hold History Suspend History								

• Click on Assets.



4	ct Finance and HR Inventory Maintenar							
tonal								
tons								
0		Modellin	SeriaNo	AccelRentin	LocationDesc	Location	Siminadress	4
	and have	CHARLEN	erer non ne	reserveyre	SARRAN MARK	earsten.	a da durantes	
E NMACH	New Machine		nm10301			Reception	Plot 91 Leaf Road	, For
▶ E SP2020		SP 2020	2020-102041			Reception		
E \$92020	SP2020 Sprint Colour Multi Functional Copier	5P2020	2020-103053	AREGODDO48		First Floor	1 Postal, Address	r, pos
	a P PartCode P E NMACH + E SP2020	Image: Second	Image: Second	Image: Constraint of the constraint	Point a column header here is group for that column      PartCode    Description    ModelNo    SerialNo    AssetRegNo      Image: PartCode    Description    ModelNo    SerialNo    AssetRegNo   <	Image: Construction of the second of the	Image: second memory of the second memory	Image a column header here to group first column      P      PartCode    Description      ModeRNO    SerialNo      AssetRegNo    LocationDesc      Location    ShippingAddress      Image a column header here to group first column    ModeRNO      SerialNo    AssetRegNo    LocationDesc    Location      ShippingAddress    Image: Column header here to group first column    Image: Column header here to group first column      Image: The second first column header here to group first column here to group firs



- 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.



Home Equipment a	nd Locations Contract Finance and HR 1	nventory Maint	tenance and Projects	Manufacturiz	ng Procurement	Sales Service Re	porting Utilities	- 8	
🔁 🕼 🗙 🛛		Durban	• 🕹	100		2 📬			
udd Edit Delete V	lew Save Layout Workspaces Save Fib	er Al	• Refresh	Revalue C	onvert Buy Back	Print Export	Reports		
Maintenance	Format		Current	Pr	ocess	Pint	Reports		
nks 🕴		11							
iter text to search P	Diag a column header here to group by that o							/	
65 G	Description	InventoryC	SerialNo	ModelNo	AsselRegNo	CustomerName	DeptName	Status	
Functions	•								
THE PERSON NEW YORK	SP2020 Sprint Colour Multi Functional Copie	er \$P2020	20-12345	\$P2020	123	Hope Works	Technical	A	
WO History	SP 19 19 Sprint Colour MFC	SP 1919	19-12345	1919		Derton Technologies		A	
	SP 19 19 Sprint Colour MPC	SP1919	19-90200	1919				A	
	SP 1919 Sprint Colour MFC	SP1919	19-90201	1919		Office Supples Unl		A	
Project History	Sprint copier	SP1818	18-30200			Hope Works	Technical	A	
	K147 Kyocera Colour Copier	1458-96523	K147-123456789	K147		Office Supplies Uni		A	
	K147 Kyocera Colour Copier	1458-96523	SIN13512345	K147				A	
Meters	K147 Kyocera Colour Copier	1458-96523	SIN32413546	K147		Hope Works	Technical	A	
	SP 19 19 Sprint Colour MPC	SP1919	20-857485	1919		Hope Works	Technical	A	
	Kruger ZN Fax Machine	KZN-12ZTFB	sin12345568	21122		Young Electric	Sales Department	A	
History	K147 Kyocera Colour Copier	1458-96523	sin123	K147		Young Electric	Sales Department	A	
1220	K147 Kyocera Colour Copier	1458-96523	14-9652365	K147		Westwood Dynamic		A	
	SP2020 Sprint Colour Multi Functional Copie	y 5P2020	abc147a	SP2020				A	
THE OWNER STREET	SP2020 Sprint Colour Multi Functional Copie	er SP2020	abc147b	SP2020				A	
BOM	SP2020 Sprint Colour Multi Functional Copie	er \$92020	abc147c	SP2020		Derton Technologies		A	
	SP 19 19 Sprint Colour MFC	SP1919	cvb123	1919				A	
	SP 19-12 Colour Copier	SP 19-123456	SP19-12185274	SP19-12		Titan Group		A	
Warranties 1	SP 19-12 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	
	SP 19-12 Colour Copier	SP19-123456	1912-147258	SP19-12				A	
Notes	SP 19-12 Colour Copier	SP19-123455	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	
Documents	SP19-12 Colour Copier	SP19-123456	1912-102033	SP19-12				A	
Columents	9P19-12 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.

Help v2024.5.0.7/1.0 - Pg 13 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential



PP0	-	0.04053					PO: Version 2.1.0.5						
Home	Equpmer	nt and Local	-	not Finance	and HR Im	entory Manter	ance and Projects	M		Procurement 5	Sales Service Rep	orang Utilities	- 8
0	X		2	4	8	Durban	• 🕲	8	6 1	1	2 1	1	
Add Ed	t Delete	Vew	Save Layout	Workspace	s Save Filter	Al	• Refresh	Revi	alue Coni	ert Buy Back	Print Export	Reports	
Mak	tenance			Format		- De	ent ,		Proce		Print	Reports	
-		1		C40044			d Filter : Contain	Tea			Print	NOW D 1	
inks eter text to r	_	0					o rater i Contante	allac	namoj, zi	120-102041			
	ANADIT /	1109										1	1
Meters		De	cription			InventoryCode	SerialNo	1	ModelNo	AssetRegNo	CustomerName	DeptName	Status
							2020-102041				100000		
		1 2	020 Sprint Co	Nour Multi Fur	nctional Copier	SP2020	2020-102041		\$92020		Hope Works	Technical	A
BOM Warrantie	5 1												
Warrantie	8 1												
	15 1												
Warrante													
Warrantie Notes	te.												
Warrantie Notes Documen	ts nce												
Warrantie Notes Documen Maintena	ts nce												
Warrantie Notes Documen Maintena	ts nce ton		Contains([Se	enañio], 2020	3-102041)							24 Apr 20	EdtFi



#### **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.



	¥						Contract	Listing - BPO: W	ersion 2.1.0.56 - Exam	nple	Company		-	a x
0	Home	Equipmer	nt and	Lice	ations Cont	act Finance a	nd HR Inver	itory Maintena	nce and Projects Ma	inte	acturing Procurement Sales Ser	vice Reporting	Utities	- & x
Add	Edt Procest	X Delete	Ver		C Save La	aces • 🚳 S Iter 1 🕼 P	iuspend 🚜 iulease (Pr	Release For Appr Remove From Ap Approve Contrac itus Processing	proval Oose	Duri ID 0 1 2	Al Sites Durban Pretoria	Print Exp	Report Report	
Links			3			elin here to por				3	Cape Town		1	
Enter te	ext to sear	(d)	ρ		Contractivo	ContractType			CustomerName			StartDate	EndDate	Department
Fund	tions			+	COLO DE	consactive	rorgani	custome code	Customernane	x		Starturate	L'AUGIE	Ucpar uner
run	.0005					-	Data in	171001	The Cours	^	Contrast Contra	1 11 march 100	12.11- 20.10	Color Dana
Not	ë				00000014	090	Durban Area		Titan Group		Cost Per Copy		16 May 2019	
					00000016	OPC	Main	TIA001	Titan Group Samanthas Diner		Cost Per Copy		13 Jun 2019	19.29.00
					00000018	CPC	Main to	SAM001	COMMITCHES -	i Nar	Cost Per Copy	09 Jul 2014	09 34 2019	Sales Depar
					CO0000019 CO0000020	090	BPO_TEL	OFF001	Office Supplies Unlim	ited.		28 Jul 2014	28 3/ 2019	Sales Depar
						CPC	Main Main	HOP001	Hope Works		Cost Per Copy		31 Jan 2016	The second second
					00000028	090 090	Durban Area	HAC001	Hack PC - IT Shop		Cost Per Copy		29 Jun 2020	
					CO0000031	OC OC	Durban Area		Young Electric Samanthas Diner		Cost Per Copy Cost Per Copy		24 Mar 2021 23 Jun 2021	
Hol	d History				00000041	CPC	Main	PAN001	Panda Copiers		Cost Per Copy		05 34 2021	
					00000042	OPC	Main	HOP001	Hope Works		Cost Per Copy		07 Sep 2021	
					00000043	OPC OPC	Main	HOP001	Hope Works		Cost Per Copy		07 Sep 2021	
Sus	pend Hist	lory -			00000044	CPC	Main	BOT0001	Bothas Networking in		Cost Per Copy	a statistica and	25 Oct 2021	
	essing													
Inv	vices													
Cre	edit Notes													
				10										
	Indows *	1	1										24 Apr 20	60 P



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

•				Contract	Listing - BPO: V	ersion 2.1.0.56 - Example	e Company			80	X
Home Equipment an	dle	cations Con	tact Finance i	nd HR Inve	ntory Maintene	ince and Projects Manuf	facturing Procurem	ent Sales Serv	ice Reportin	g Utilities	- 8 3
· · · · ·	en	Cave L	baces • 🐻	Suspend 🖟	Release For App Remove From Ap Approve Contras	oproval Oose Act	tve •	Find Serial No.	Alexand and	bort Report	5
Processing		Fornal	6 a 1	St	Nus Processing		Current	4	Print		1
inks #											
nter text to search P		ContractNo	ContractType			CustomerName	ContractTypeDesc	Ordertia	StartDate	EndDate	Departmen
Functions	9	CONTRACTION	consactive.	1003001	CONTRACTOR	Customeritante	consister ypenese	ordenio	218 LLAIC	LINDAIC	Deba niel
runcuons		C00000014	CPC	Durban Area	TTA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Calas Dena
Notes	ľ	C00000016	CPC	Main	TIA001	Titan Group	Cost Per Copy			13 Jun 2019	
		C00000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 34 2014	09 34 2019	Sales Depa
		C00000019	CPC	BPO_TEL	OFF001	Office Supples Unlimited			28 34 2014	28 34 2019	Sales Depa
Decurrents		CO000020	CPC	Main	HOP001	Hope Works	Cost Per Copy			31 Jan 2016	
		C0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Depa
		C0000031	090	Durban Area	YE5001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Depa
Hold History		C0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Depa
CARAGE CONTRACTOR		CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Depa
		C00000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
Suspend History		C00000043	OPC 290	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Depa
CHARLES OF A		C00000044	090	Main	8070001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Depa
Processing Invoices Credit Notes											
pen Windows *	1	Ģ.								24 Apr 20	-0



#### 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.

Help v2024.5.0.7/1.0 - Pg 18 - Printed: 21/08/2024



<b>A</b> '			Contract	Listing - BPO: W	ersion 2.1.0.56 - Exampl	le Company			2	X
Home Equipment an	d Locations Cont	ract Finance a	nd HR Inver	itory Maintena	nce and Projects Manu	facturing Procurer	nent Sales Serv	ice Reportin	) Utilities	- # )
ABVI	Save L	ayout 👘	uld 💰	Release For Appr	oval 👝 D	urban •	Find Serial No.		A 6	
🔮 🚺 🗙 🚺	Worksp	aces * 👼 S	uspend 🚜	Remove From Ap		ctive +	mind Senaction		8 1	
Add Edit Delete W	ew Save F	(****) See		Approve Contrac	Close	Refresh	Pind Contract	Print Ex	ort Report	5
Processing	Format	-		bus Processing		Current		Print	,	
Links #								1	17	
Enter text to search P									1	1
a line and a more second second	Contractivo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	: OrderNo	StartDate	EndDate	Departmen
Functions	۲									
And the second se	C0000014	CPC	Durban Area	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Depa
Notes	C00000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Depar
	C00000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Depar
	C00000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimite	d Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Depar
Doarenta	+ CO0000020	CPC	Main 🔶	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Depar
	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
Hold History	C0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Depar
a na sana ang	C00000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Depar
	C00000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
Suspend History	C0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Depar
Constant of the	C00000044	OPC	Main	BOT0001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Depar
Processing Invoices										
Credit Notes										
	(c			0						-
Ipen Windows *									24 Apr 20	18



#### 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.



			Putable	A	(and and and	Longer .	Distant House
	Vescription	Modervo	Senario	Assebiegivo	LocatoriUesc	Location	ShippingAddress
	K147 Kyocera Colour Copier	K147	SIN32413546			Reception	Should see this, for phy-
• 🗉	Forest Hills Centre				Forest Hills Centre	Forest Hills Centre	
Ð	Pine Willows Centre				Pine Willows Centre	Pine Willows Centre	Plot 91 Leaf Road, Fore
🗄 SP1818	Sprint copier		1818-1111	AREG000223		Reception	Plot 91 Leaf Road, Fore
	PartCode • 1458-96523 • E E	PartCode  Description    PartCode  Description    Image: Comparison of the state of	Image: With the second secon	PartCode  Description  ModelNo  SerialNo    V  V  V  V  V    ID  1458-96523  K1477 Kyocera Colour Copier  K147  SIN32413546    V  ID  Forest Hills Centre  V  V    ID  Pine Willows Centre  V  V  V	PartCode      Description      ModelNo      SerialNo      AssetRegNo        Image: PartCode      Description      Image: PartCode      SerialNo      AssetRegNo        Image: PartCode      Image: PartCode      K147      StraitNo      AssetRegNo        Image: PartCode      K147Kyocera Colour Copier      K147      Str32413546      Forest Hills Centre        Image: PartCode      Pone Willows Centre      Image: PartCode      Image: PartCode      Image: PartCode	PartCode  Description  ModelNo  SerialNo  AssesRegNo  Locator/Desc    PartCode  Description  ModelNo  SerialNo  AssesRegNo  Locator/Desc    Image: Transport of the series    Image: Transport of the series  Forest Hils Centre  Transport of the series  Transport of the series    Image: Transport of the series  Price Willows Centre  Transport of the series  Price Willows Centre	PartCode  Description  Mode/No  SerialNo  AssetRegNo  LocationDesc  Location    Image: PartCode  Description  Image: PartCode  Image: PartCode  Image: PartCode  LocationDesc  LocationDesc  Location    Image: PartCode  Image: PartCode  Image: PartCode  Image: PartCode  Image: PartCode  LocationDesc  LocationDesc  Location    Image: PartCode  Image: PartCode



#### NAVIGATE TO CUSTOMER LOCATIONS

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

Help v2024.5.0.7/1.0 - Pg 22 - Printed: 21/08/2024



k Save Layout Worksp								
Links #								
inter text to search ,P	PartCode	Description	ModelNo	SeriaNo	AssetRegNo	LocationDesc	Location	ShippingAddress
Functions	1							
	⊞ 1458-96523	K147 Kyocera Colour Copier	K147	5IN32413546			Reception	Should see this, for physi
Notes	• 🗉	Forest Hills Centre				Forest Hills Centre	Forest Hills Centre	Plot 91 Leaf Road, Fores
	Ð	Pine Willows Centre				Pine Willows Centre	Pine Willows Centre	Plot 91 Leaf Road, Fores
	and the second second second							
Documenta Hold History Suspend History	₩ \$P1818	Sprint copier		1818-1111	AREG000223		Reception	Plot 91 Leaf Road, Fores
Hold History	■ \$P1818	Sprint copier		1818-1111	AREG000223		Reception	Plot 91 Leaf Road, Fores
Hold History Suspend History	■ \$P1818	Sprint copier		1818-1111	AREG000223		Reception	Plot 91 Leaf Road,

• Click on Customers.

Help v2024.5.0.7/1.0 - Pg 23 - Printed: 21/08/2024



🔉 📓	-	Finance and HR Inventory		3				rting Utilities — d <sup>a</sup>
itomers Services Template	s Commercials PC	DS Lite Quotes Orders In		edit				
Master	-	Processing	NO	ibes				
Links 4	1	ke here begroup by that calu		-				1
p		Description		SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress
Functions	•	Velapini	PIVORIN	JOINT	neereyw	LINDON D'EN	Louision	a que que co
, unclosed	All A	K147 Kyocera Colour Copier	K147	SIN32413546			Reception	Should see this, for physic
Notes		Forest Hills Centre	747			Forest Hills Centre	Forest Hills Centre	
	Ð	Pine Willows Centre				Pine Willows Centre		Plot 91 Leaf Road, Forest
	E SP1818	Sprint copier		1818-1111	AREG000223		Reception	Plot 91 Leaf Road, Forest
Suspend History								
Suspend History Processing								
Processing								

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



20	New Yorks	103503	1999 (Maria)	213 (A)(15)	and to share the		and the first		a sin since	Receiption 1988	e - 8
	tome Equips	ient and	Locations Con	tract Finance a	no ne unventory mar	cenance and P	rojecis manuraciu	ring Procureme	nt Sales Service	Reporting Utility	8 - 0
+	2 X	G		13	D 14	p.	C Durbe	n .	🕲 📲	1	
Add	Edit Delet	e Syn	: View S	ave Layout Wor	kspaces Hold Relea	ne Approve	Dedne Activ			leports	
					• 12 I	Account	Account			•	
	Processio	g	à	Format	, Stat	s Processing	á.	Current	a Report	1 4	
inks											
nter text	t to search	ρ		CustomerType		Department	Denillame	Challanariation	CustomerCreditLimit	OraditCharleDerr	CredtTermsDe
		- ,	-	Constructed a libre	excernic manne .	Depar unens	reprisine	antoreau provi	Contrainer of Containing	o coto cobes.	erentre inter
Projec	ct History			NF.	Park Color Second	Color	Color Descriptions	S.du	10 000 00	Towns and they	20. David
			CU5001	RE	Cash Sales Account	Sales	Sales Department	Durban		Terms and Limit	30 Days
		Ľ	HOP001	RE	Hope Works	Tech	Technical	Durban		Terms and Limit	30 Days
Histor	in the second		OFF001	RE	Office Supplies Unlimited	the last	Polos Presidentes	Durban		Terms and Limit	30 Days
( Priva	·9		YES001	00	Young Electric	Sales	Sales Department	Durban	100 000.00		COD
			BOT0001	IT	Bothas Networking inc Samanthas Diner			Durban Durban		No Check	30 Days
		- H	SAM001	RE	A State of the second			Durban	10000	No Check	30 Days
Equp	ment	H	DAN001	IT	Danny Storm IT Cafe			Durban		No Check	30 Days
		H	PAN001	RE	Panda Copiers			Durban		No Check	C00
			HAC001	Π	Hack PC - IT Shop					No Check	
Contr	racts		PDN0001	GV CDUTTEDA	Pink Shoes			Durban Durban		Terms and Limit	30 Days
		ł	GIL000001	GLLITTSPA	Dolf Lundgren					Terms and Limit	
			H1L000001	HELLORESTP	Mary Contrary			Durban Durban		Terms and Limit	000
Locati	tions	÷	305001	RE	Just In Time					No Check	30 Days
225004			LITOOO1	RE	Little Bee Honey			Durban Durban		Terms and Limit	40 Davie
			GRE001	RE	Green Tea Supples Fine Hair Salon			Durban	1000	Terms and Limit	30 Days
1440	History		FIN0001	RE	Bettes Summer Shop a			Sec.	101	Terms and Limit	C00
	, name y	H	BET0001	RE	North West Branch			Durban Durban	100	Terms and Limit	600
			biancad DAN002					Durban		Terms and Limit	C00
				17	Dancing Shoes					No Check	
Invoc	ce Delivery		BIG0001	00	Big Bargains Manda Nortee			Durban		Terms and Limit	000
		-	MAN0001	RE	Mandy Norton			Durban		Terms and Limit	C00
			DAN0003	17	Dance Shoes			Durban		Terms and Limit	con
and the second second	nercial		BIL0001	00	Billys Barn			Durban		Terms and Limit	C00
Excep	puvis	-	AN00001	ACC	Another new customer	2 miles	Calu Dana da ser	Durban		Terms and Limit	
			APP0001	RE	Apple Juice Inc	Sales	Sales Department	Durban	0.00	Terms and Limit	



#### 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.



nks	Edit Dele	te Sy	nc View 1			In.					-		
nks		5	nc View S			P	0	Durban	0	ŧ,	G		
intre .	Process	ing .		Save Layout Wor	kspaces Hold Relea	ise Approve Account	Dedne Account	Active	Refresh	Export R	leports		
intre .			-	Format	Statu	s Processing		Current	-	Report			
intre .			5 7/ 1				-						
	to search	p									_		
			CustomerCode	e CustomerType	CustomerName	Department	DeptName	SiteDescr	ption Custom	erCreditLimit	CreditCheckDesc	CreditTen	nsD
-			1										
Project	t History		CU5001	RE	Cash Sales Account	Sales	Sales Departm	ent 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	
History			YES001	CO	Young Electric	Sales	Sales Departm	ent Durban		100 000.00	No Check	COD	
			BOT0001	Π	Bothas Networking inc			Durban		50 000.00	No Check	30 Days	
			SAM001	RE	Samanthas Diner			Durban		45 000.00	No Check	30 Days	
Equipm	ent		DAN001	Π	Danny Storm IT Cafe			Durban		75 000.00	No Check	30 Days	
			PAN001	RE	Panda Copiers			Durban		50 000.00	No Check	C00	
			HAC001	π	Hack PC - IT Shop			Durban		0.00	No Check	C00	
Contra	xts		PDN0001	GV	Pink Shoes			Durban		0,00	Terms and Limit	30 Days	
			GIL000001	GILLITTSPA	DolfLundgren			Durban		0.00	Terms and Limit	COD	
			HIL000001	HILLCRESTP	Mary Contrary			Durban		0.00	Terms and Limit	COD	
i			3U5001	RE	Just In Time			Durban		50 000.00	No Check	30 Days	
Locatio	76		LITOOD1	RE	Little Bee Honey			Durban		0.00	Terms and Limit		
			GRE001	RE	Green Tea Supplies			Durban		75 000.00	Terms and Limit	30 Days	
		=	FDN0001	RE	Fine Hair Salon			Durban		0.00	Terms and Limit	C00	
Hold H	istory		BET0001	RE	Betties Summer Shop a			Durban		0.00	Terms and Limit		
			biancad	RE	North West Branch			Durban		0.00	Terms and Limit	COD	
			DAN002	Π	Dancing Shoes			Durban		10 000.00	No Check	C00	
Invoice	e Delivery		BIG0001	00	Big Bargains			Durban		10 000.00	Terms and Limit	C00	
			MAN0001	RE	Mandy Norton			Durban		0.00	Terms and Limit	COD	
_			DAN0003	π	Dance Shoes			Durban		0.00	Terms and Limit		
Comme	erdal		BIL0001	CO .	Billys Barn			Durban		0.00	Terms and Limit	C00	
Except			ANO0001	ACC	Another new customer			Durban		0.00	Terms and Limit		
			APP0001	RE	Apple Juice Inc	Sales	Sales Departm	ent Durban		0.00	Terms and Limit		



## **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.



	٠				Functional Locat	ions for Cus	tomer HOP001 - BPO: Vers	ion 2.1.0.56 - Exa	imple Compar	ij			н.	0		X
	Home	Equipment	t and Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	*	Ð	Х
Add	Edt	X Delete	Workspaces	Export	Durban	• Refre	10 M									
	Process	-			a Curr	ent	4									_
Links			a Locato	ns												_
100	ext to ser	ir ch	۶ ، ۱ (1	Forest Hills	i Centre	-										-
			1 4	Pine Willow	is Centre											
Te Sp	dnical eofcator	ns	1.1	Joly Farm	Centre											
			1.4	Silver Brd	Centre											
10	id bonal D	10		Liles Quar	ter Centre											
				NeviHope	Aal											
				NON OLE	AT BPOV2 TEST											
De	xuments			BPO2 TEST	11											
			1	BPO2 Test	7											
W	0 History		. 1	BPO2 Test	2											
			. 1	BPO2 Test	3											
	444174.53	-	1.4	BPO2 Test	4											
fa.	kare And	YS	. 1	Kloof Corn	er Mal											
				WaterCres	it Vilage Mall											
W	arranty			Bothas Hill												
			1.00													
M	sintenano ethodolog	e V														
94																
Open V	Windows •		3										24 Apr	2018	1	il.



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



n	Home	VA			- 1 C			Procurement Sales			. 8 )
Add	Edit	Delete Back	Save Layout Wo	visnaces Ref	ia resh						
				•							
	Process			A Curre	a 10						
		ther here is group is		Columb la Tu	Maharfada	Taba	Can (ref) you	Marthumber	MnBoundary	Instantion	1.
TasiN	um	TaskDesc		ScheduleTy.,	, metercode	Units	ServiceEvery	MaxBoundary	Mindoundary	LastPerfDate	Ne
TT002	1	Weekly - Call ;	per WÖ	Time		w	1.00	0.00	0.00	19 Feb 2017	26
11070		2 Daly - Cal p		Time		d	2.00			07 Apr 2017	09
11026	5	Monthly - Gen	erate Project	Time		m	1.00	0.00	0.00	11 Mar 2017	11
11000	01	Daily - Call per	r WO	Time		d	1.00	0.00	0.00	11 Apr 2017	11
WS		Weekly Service	t	Time		w	1.00	0.00	0.00	19 Jun 2017	19
Tier		Commercial Tie	er Test	Time		m	1.00	0.00	0.00	19 Jun 2017	19
11067	1	Yearly, Mono	1000 - WO Only	Tine		YYYY	1.00	0.00	0.00	19 Jun 2017	19

Help v2024.5.0.7/1.0 - Pg 31 - Printed: 21/08/2024



• 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