

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

CONTRACT

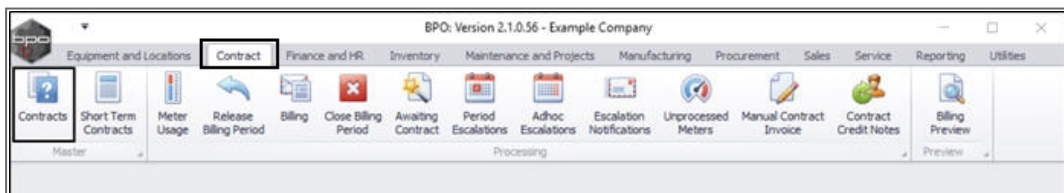
CONTRACTS – SCHEDULED MAINTENANCE TASKS

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.

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 | Hold | Release For Approval | Workspaces | Suspend | Remove From Approval | Save Filter | Release | Approve Contract | Close Contract

Processing | Format | Status Processing

Links: Enter text to search...

Functions
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 Invoices
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ContractNo	ContractType	Location	CustomerCode	CustomerName	Start Date	End Date	Department
CO0000014	CPC	Durban Area	TJA001	Titan Group	16 May 2014	16 May 2019	Sales Depart
CO0000016	CPC	Main	TJA001	Titan Group	13 Jun 2014	13 Jun 2019	Sales Depart
CO0000018	CPC	Main	SAM001	Samanthas Diner	09 Jul 2014	09 Jul 2019	Sales Depart
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	28 Jul 2014	28 Jul 2019	Sales Depart
CO0000020	CPC	Main	HOP001	Hope Works	01 Jan 2011	31 Jan 2016	Sales Depart
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	29 Jun 2015	29 Jun 2020	Sales Depart
CO0000031	CPC	Durban Area	YES001	Young Electric	24 Mar 2016	24 Mar 2021	Sales Depart
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	23 Jun 2016	23 Jun 2021	Sales Depart
CO0000041	CPC	Main	PAN001	Panda Copiers	05 Jul 2016	05 Jul 2021	Sales Depart
CO0000042	CPC	Main	HOP001	Hope Works	07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	01 Aug 2016	07 Sep 2021	Sales Depart
CO0000044	CPC	Main	BOT001	Bothas Networking Inc	25 Oct 2016	25 Oct 2021	Sales Depart

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

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 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**.

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 | Suspend | Release | Release For Approval | Remove From Approval | Approve Contract | Close Contract | Refresh | Find Serial No. | Find Contract | Print | Export | Reports

Processing | Format | Status Processing | Current | Print | R...

Links

Enter text to search...

Functions

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- Documents
- Hold History
- Suspend History

Processing

- Invoices
- Credit Notes

ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentName
CO0000014	CPC	Main	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

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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.

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

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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	AREG000048	First Floor	1 Postal, Address, postal 3	

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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.

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

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Enter text to search...

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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	AREG000048	First Floor	1 Postal, Address, postal 3	

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- Click on **Assets**.

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

Assets | Depreciation | Functional Locations

Equipment | Locat...

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Enter text to search...

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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	AREG000048	First Floor		1 Postal, Address, postal 3

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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.

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 Refresh Revalue Convert Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links Enter text to search... Drag a column header here to group by that column

Description	InventoryC...	SerialNo	Modelo	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	SBN13512345	K147				A	
K147 Kyocera Colour Copier	1458-96523	SBN02413546	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	

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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.

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 | Refresh | Revalue | Convert | Buy Back | Print | Export | Reports

Maintenance | Format | Current | Process | Print | Reports

Links

Enter text to search...

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

Meters | History | BOM | Warranties | Notes | Documents | Maintenance | Depreciation

x [x] Contains([SerialNo], '2020-102041') Edit Filter

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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 | Hold | Release For Approval | Workspaces | Suspend | Remove From Approval | Save Filter | Release | Approve Contract | Close Contract

Processing | Format | Status Processing

Links: Enter text to search...

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ContractNo	ContractType	Location	CustomerCode	CustomerName	Start Date	End Date	Department
CO0000014	CPC	Durban Area	TJA001	Titan Group	16 May 2014	16 May 2019	Sales Depart
CO0000016	CPC	Main	TJA001	Titan Group	13 Jun 2014	13 Jun 2019	Sales Depart
CO0000018	CPC	Main	SAM001	Samanthas Diner	09 Jul 2014	09 Jul 2019	Sales Depart
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	28 Jul 2014	28 Jul 2019	Sales Depart
CO0000020	CPC	Main	HOP001	Hope Works	01 Jan 2011	31 Jan 2016	Sales Depart
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	29 Jun 2015	29 Jun 2020	Sales Depart
CO0000031	CPC	Durban Area	YES001	Young Electric	24 Mar 2016	24 Mar 2021	Sales Depart
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	23 Jun 2016	23 Jun 2021	Sales Depart
CO0000041	CPC	Main	PAN001	Panda Copiers	05 Jul 2016	05 Jul 2021	Sales Depart
CO0000042	CPC	Main	HOP001	Hope Works	07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	01 Aug 2016	07 Sep 2021	Sales Depart
CO0000044	CPC	Main	BOT001	Bothas Networking Inc	25 Oct 2016	25 Oct 2021	Sales Depart

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- 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 Suspend Release Remove From Approval Approve Contract Release For Approval Close Contract Refresh Find Serial No. Find Contract Print Export Reports

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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

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	HCP001	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	HCP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HCP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Departm
CO0000044	CPC	Main	BOT001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Departm

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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.

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

Links

Enter text to search...

Functions

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Suspend History

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Credit Notes

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 ...

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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

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Enter text to search...

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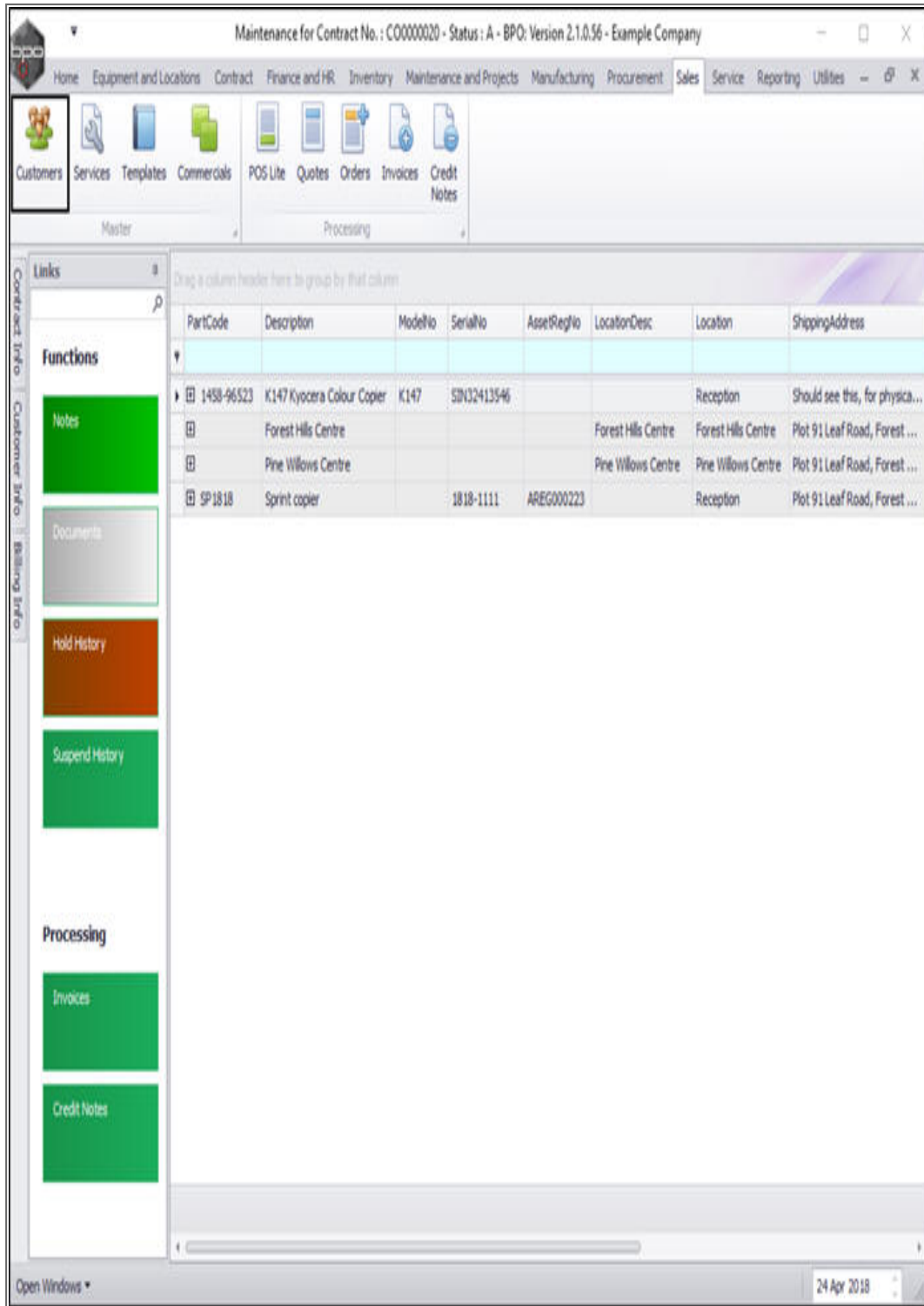
Credit Notes

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 ...

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- Click on **Customers**.



- 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 Dedine Account

Durban Active Refresh Export Reports

Processing Format Status Processing Current Reports

Links

Enter text to search...

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
PDN0001	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	
biacad	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
AN00001	ACC	Another new customer			Durban	0.00	Terms and Limit	
APP0001	RE	Apple Juice Inc	Sales	Sales Department	Durban	0.00	Terms and Limit	

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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.

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 Dedine 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	COO
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	COO
HAC001	IT	Hack PC - IT Shop			Durban	0.00	No Check	COO
PIN0001	GV	Pink Shoes			Durban	0.00	Terms and Limit	30 Days
GIL000001	GILLTTSPA	Dolf Lundgren			Durban	0.00	Terms and Limit	COO
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00	Terms and Limit	COO
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	COO
BET0001	RE	Betties Summer Shop a...			Durban	0.00	Terms and Limit	
biandad	RE	North West Branch			Durban	0.00	Terms and Limit	COO
DAN002	IT	Dancing Shoes			Durban	10 000.00	No Check	COO
BIG0001	CO	Big Bargains			Durban	10 000.00	Terms and Limit	COO
MAN0001	RE	Mandy Norton			Durban	0.00	Terms and Limit	COO
DAN0003	IT	Dance Shoes			Durban	0.00	Terms and Limit	
BIL0001	CO	Billys Barn			Durban	0.00	Terms and Limit	COO
AN00001	ACC	Another new customer			Durban	0.00	Terms and Limit	
APP0001	RE	Apple Juice Inc	Sales	Sales Department	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.

Functional Locations for Customer HOP001 - 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 | 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
- NewHopeMall
- NON CLIENT BPOV2 TEST
- BPO2 TEST 1
- BPO2 Test 7
- BPO2 Test 2
- BPO2 Test 3
- BPO2 Test 4
- Kloof Corner Mall
- WaterCrest Village Mall
- Bothas Hill

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- 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	Daly - 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

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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**.

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