

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

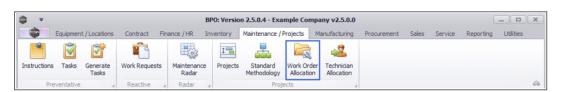
PROJECTS

WORK ORDER ALLOCATION – AUTO CREATE PROJECTS

The **Auto Create Projects** process creates projects from work orders with matching parameters.



Ribbon Access: Maintenance / Projects > Work Order Allocation



- 1. The **Work Order Allocation** listing screen will be displayed.
- 2. This screen is divided into **2** frames:
 - Unassigned Work Orders: This frame lists all the unassigned work orders.
 - **Project Work Orders**: This frame lists the projects with linked work orders.



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	PWO0000058	Delete work order linked to client location	Pretoria		PRJ0000075	Check Technician Assignment	
	PWO0000061	test creating a work order for pretoria via projects	Pretoria		PRJ0000077	SubProject 1	
	WO0000288	WS - Weekly Service	Durban		PRJ0000082	Test Projects viewed in Customer screen	
	WO0000289	BathBinMaint - Bathroom Bin Maintenance	Durban			New machine installation	
	WO0000290	AirMaint - Airfreshner Maintenance	Durban			tst	
	WO0000291	AirMaint - Airfreshner Maintenance	Durban			SP240 New Deal	
	WO0000292	1MMS - 1 Month Machine Service	Durban		PRJ0000089	Machine installations	
	WO0000299	WS - Weekly Service	Durban			Sprint SP1912 New Deal Sale	
	WO0000300	BathBinMaint - Bathroom Bin Maintenance	Durban			Service for HOP001 on 06 Nov 2014	
	WO0000302	BathBinMaint - Bathroom Bin Maintenance	Durban		PR30000092	Scheduled Maintenance for HOP001 on 06 Nov 2014	
	WO0000303	AirMaint - Airfreshner Maintenance	Durban			Scheduled Maintenance for DER001 on 06 Nov 2014	
	WO0000304	AirMaint - Airfreshner Maintenance	Durban			Scheduled Maintenance for YES001 on 06 Nov 2014	
	WO0000305	WS - Weekly Service	Durban			Scheduled Maintenance for TIA001 on 06 Nov 2014	
	WO0000306	BathBinMaint - Bathroom Bin Maintenance	Durban			Site Inspectino	
	WO0000307	1MMS - 1 Month Machine Service	Durban			Install Machines	
	WO0000308	WS - Weekly Service	Durban			Machine inspection required	
	WO0000309	BathBinMaint - Bathroom Bin Maintenance	Durban			Scheduled Maintenance for HOP001 on 14 May 2015	
	WO0000310	AirMaint - Airfreshner Maintenance	Durban		➡ PRJ0000102	Scheduled Maintenance for DER001 on 14 May 2015	
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SINGLE WORK ORDER

- 1. In the **Unassigned Work Orders** frame, click in the **row** of the work order you wish to create a project for.
- 2. Click on Auto Create Projects.
- 3. The **Choose Date** screen will display.
- The date field will display the current date. Type in or click on the down arrow to use the calendar function to select the date to generate the project for.

Note that the date for the Project has to match the Request Date of the work order.

5. Click on OK.



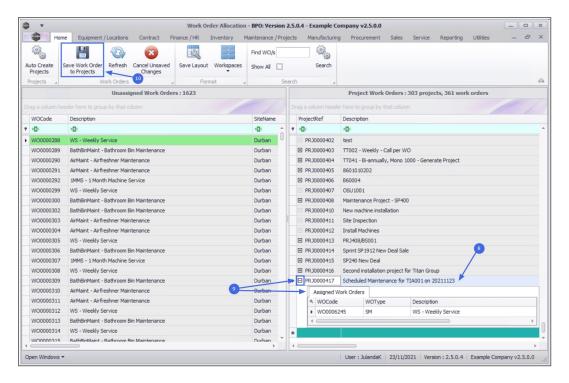
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	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	03/11/2021									
	WO0006235	Tier - Commercial Tier Test	Durban	06/11/2021	I	VST	PRJ0000091	Service for HOP00	1 on 06 Nov 2	014			
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	WO0006237	WS - Weekly Service	Durban	09/11/2021	S	м		Scheduled Mainter	nance for DER	001 on 06 Nov 2014	ŧ		
	WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021	P	R		Scheduled Mainter	nance for YESC	01 on 06 Nov 2014			
×	WO0006245	WS - Weekly Service	Durban	23/11/2021	→ 5	м		Scheduled Mainter	nance for TIA0	01 on 06 Nov 2014			
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T	PWO0000053	Work Mgt - work order linked to a client a	Pretoria	31/03/2017	0	R	PRJ0000099	Install Machines					
	PWO0000058	Delete work order linked to dient location	Pretoria	31/03/2017	0	R	➡ PRJ0000100	Machine inspection	required				
T	PWO0000061	test creating a work order for pretoria via	Pretoria	28/11/2017	C	R	➡ PRJ0000101	Scheduled Mainter	nance for HOP	001 on 14 May 201	5		
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- 6. When you receive the **Process Complete** message to confirm that;
 - 1 new project(s) created.
- 7. Click on OK.

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V	VO0006225	WS - Weekly Service	Durban	26/10/2021	SM		PRJ0000075	Check Technician Assignment	
V	VO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	27/10/2021	SM		PRJ0000077	SubProject 1	
V	VO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021	CM		B 0000082	Test Projects viewed in Customer screen	
V	VO0006228	1MMS - 1 Month Machine Service	Durban	28/1 Proces	s Complete 🔫	_	× 10000083	New machine installation	
V	VO0006230	AirMaint - Airfreshner Maintenance	Durban	01/1		-	6 10000085	tst	
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V	VO0006232	WS - Weekly Service	Durban	02/1			10000089	Machine installations	
V	VO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	03/1			10000090	Sprint SP1912 New Deal Sale	
V	VO0006235	Tier - Commercial Tier Test	Durban	06/1 7	-> ОК		J0000091	Service for HOP001 on 06 Nov 2014	
V	VO0006236	WS - Weekly Service	Durban	09/1-	J.M.		La 110000092	Scheduled Maintenance for HOP001 on 06 Nov 2014	
V	VO0006237	WS - Weekly Service	Durban	09/11/2021	SM			Scheduled Maintenance for DER001 on 06 Nov 2014	
٧	VO0006238	Test PQ Source Type Work Order	Durban	14/11/2021	PR			Scheduled Maintenance for YES001 on 06 Nov 2014	
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P	WO0000048	Work order part request	Pretoria	14/02/2017	DR			Site Inspectino	
P	WO0000053	Work Mgt - work order linked to a client a	Pretoria	31/03/2017	DR			Install Machines	
P	WO0000058	Delete work order linked to client location	Pretoria	31/03/2017	DR		PRJ0000100	Machine inspection required	
P	WO0000061	test creating a work order for pretoria via	Pretoria	28/11/2017	DR		PRJ0000101	Scheduled Maintenance for HOP001 on 14 May 2015	
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- The newly created project will be displayed in the Project Work Orders frame.
- Click on the expand button in the row of the new project to display the Assigned Work Orders frame.
- 10. Click on Save Work Order to Projects.



AUTO CREATE SINGLE PROJECT WITH MULTIPLE WORK ORDERS

Important Note To create a single project from multiple work orders, the work order **parameters** have to be the **same**.

- 1. In the **Unassigned Work Order** frame, select the Work orders you wish to allocate to a project.
 - To select multiple work orders, hold down the **Ctrl** key on the keyboard and use your **mouse** to click on the relevant work orders to select.



- 2. **Scroll right** in this frame until you can view the parameters for the work orders to ensure that they are the same.
- 3. Click on Auto Create Projects.

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	WO0006247	BathBinMaint - Bathroom Bin Main	Durban	19-12345	23/11/2021	SP1919	SP 19 19 Sprint Colour M	▶ E PRJ0000071	I SP240 New Deal.
·	WO0006246	BathBinMaint - Bathroom Bin Main	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M		Check Technician Assignment
	WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021				Test Projects viewed in Customer screen
	WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier		8 New machine installation
	WO0006236	WS - Weekly Service	Durban		09/11/2021			PRJ0000085	i tst
	WO0006235	Tier - Commercial Tier Test	Durban	TIER 123	06/11/2021	SP1020	Copier	PRJ0000087	7 SP240 New Deal
	WO0006233	BathBinMaint - Bathroom Bin Main	Durban	19-12345	03/11/2021	SP1919	SP1919 Sprint Colour M	PRJ0000089	Machine installations
	WO0006232	WS - Weekly Service	Durban	SP19-12185274	02/11/2021	SP19-123456	SP19-12 Colour Copier	PRJ0000090	Sprint SP1912 New Deal Sale
	WO0006231	WS - Weekly Service	Durban		02/11/2021				Service for HOP001 on 06 Nov 2014
	WO0006230	AirMaint - Airfreshner Maintenance	Durban		01/11/2021			PRJ0000092	2 Scheduled Maintenance for HOP001 on
	WO0006228	1MMS - 1 Month Machine Service	Durban	20-12345-5689	28/10/2021	SP2020	SP2020 Sprint Colour M		Scheduled Maintenance for DER001 on
	WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021			E PRJ0000094	Scheduled Maintenance for YES001 on 0
	WO0006226	BathBinMaint - Bathroom Bin Main	Durban	19-12345	27/10/2021	SP 19 19	SP 19 19 Sprint Colour M		Scheduled Maintenance for TIA001 on 0
	WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP19-12 Colour Copier		8 Site Inspectino
	WO0006223	1MMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M	E PRJ0000099	Install Machines
	WO0006222	WS - Weekly Service	Durban		26/10/2021				Machine inspection required
	WO0006221	1MMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier		Scheduled Maintenance for HOP001 on
	WO0006219	BathBinMaint - Bathroom Bin Main	Durban	19-12345	20/10/2021	SP1919	SP 19 19 Sprint Colour M		2 Scheduled Maintenance for DER001 on
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- 4. The **Choose Date** screen will display.
- 5. The **date field** will auto populate with the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.

Note that the date for the Project has to match the Request Date of the work order.

6. Click on OK.



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	WO0006232	WS - Weekly Service	Durban	5P19-121052/4	02/11/2021	Processing	6			6		
	WO0006230	AirMaint - Airfreshner Maintenance	Durban		01/11/2021	Processing	g _4			~	ance for HOP001	
	WO0006228	1MMS - 1 Month Machine Service	Durban	20-12345-5689	28/10/2021	-					ance for DER001	
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	WO0006226	BathBinMaint - Bathroom Bin Main	Durban	19-12345	27/10/2021		-				ance for TIA001	
	WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP19-12 Colour Copier		PRJ0000098	Site Inspectino	//	
	WO0006223	1MMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M		E PRJ0000099	Install Machines		
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	WO0006221	1MMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier				tenance for HOP001	on
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- 7. When you receive the **Process Complete** message to confirm that;
 - 1 new project(s) created.
- 8. Click on OK.

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WO0006246	BathBinMaint - Bathroom Bin Main	Durban	19-12345	23/11/2021	SP 19 19	SP 19 19 Sprint Colour M		PRJ0000075	Check Technician Assignment
WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021				PRJ000082	Test Projects viewed in Customer screen
WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier			New machine installation
WO0006236	WS - Weekly Service	Durban	Process Complete 🤜	× 21					tst
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WO0006231	WS - Weekly Service	Durban		21			-	➡ PRJ0000091	Service for HOP001 on 06 Nov 2014
WO0006230	AirMaint - Airfreshner Maintenance	Durban		21				➡ PRJ0000092	Scheduled Maintenance for HOP001 on
WO0006228	1MMS - 1 Month Machine Service	Durban	UK		SP2020	SP2020 Sprint Colour M			Scheduled Maintenance for DER001 on
WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021					Scheduled Maintenance for YES001 on 0
WO0006226	BathBinMaint - Bathroom Bin Main	Durban	19-12345	27/10/2021	SP1919	SP 19 19 Sprint Colour M			Scheduled Maintenance for TIA001 on 0
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WO0006223	1MMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M			Install Machines
WO0006222	WS - Weekly Service	Durban		26/10/2021					Machine inspection required
WO0006221	1MMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier			Scheduled Maintenance for HOP001 on
WO0006219	BathBinMaint - Bathroom Bin Main	Durban	19-12345	20/10/2021	SP1919	SP1919 Sprint Colour M			Scheduled Maintenance for DER001 on 2
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- The newly created project will be displayed in the Project Work Orders frame.
- 10. Click on the **Expand** button of the new project, to view the linked work orders.

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	WO0000304	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	ŧ	PR.300	00415	SP240 Ne	w Deal					
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	WO0000302	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	ŧ	PR.300	00413	PR.3408/8	S001					
	WO0000300	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	Đ	PR300	00408	Maintena	nce Project	- SP400				
	WO0000299	WS - Weekly Service	Durban	SM	0	Open	Đ	PR.300	00406	B60004						
	WO0000292	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	Đ	PRJOO	00405	8601010	202					
	WO0000291	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	Đ	PRJOO	00404	TT041 - E	annually, 1	Mono 10	000 - Generate	Project		
	WO0000290	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	ŧ	PRJOO	00403	TT002 - \	Veekly - Cal	per WC)			
	WO0000289	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	Đ	PRJOO	00401	Implemen	tation BPO2	2				
	WO0000288	WS - Weekly Service	Durban	SM	0	Open	Đ	PRJOO	00400	Testing B	PO2					
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AUTO CREATE PROJECT FROM MULTIPLE WORK ORDERS

Note that when selecting Work Orders with different parameters, a separate project will be created for each work order.

- 1. In the **Unassigned Work Order** frame, select the Work orders you wish to allocate to a project.
 - To select multiple work orders, hold down the Ctrl key on the keyboard and use your mouse to click on the relevant work orders to select.
- 2. Click on Auto Create Projects.



Home	Equipment / Locations Contract	Wor Finance / HR		- BPO: Version 2.5.0.4 Naintenance / Projects	4 - Example Com Manufacturing			Service Reporting Utilities -	. 2
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WO0006249	BathBinMaint - Bathroom Bin Maintenan	Durban	23/11/2021	19-12345	SP 19 19	s	▶ E PRJ0000071	SP240 New Deal.	
WO0006248	WS - Weekly Service	Durban	23/11/2021	SP19-12185274	SP19-123456	5		Check Technician Assignment	
WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021			F		Test Projects viewed in Customer screen	
WO0006237	WS - Weekly Service	Durban	09/11/2021	SP19-12185274	SP19-123456	S		New machine installation	
WO0006236	WS - Weekly Service	Durban	09/11/2021			S	PRJ0000085	tst	
WO0006235	Tier - Commercial Tier Test	Durban	06/11/2021	TIER 123	SP1020	I	PRJ0000087	SP240 New Deal	
WO0006233	BathBinMaint - Bathroom Bin Maintenan	Durban	03/11/2021	19-12345	SP1919	5	E PRJ0000089	Machine installations	
WO0006232	WS - Weekly Service	Durban	02/11/2021	SP19-12185274	SP19-123456	5		Sprint SP1912 New Deal Sale	
WO0006231	WS - Weekly Service	Durban	02/11/2021			5		Service for HOP001 on 06 Nov 2014	
WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/2021			S		Scheduled Maintenance for HOP001 on 06	Nov 20
WO0006228	1MMS - 1 Month Machine Service	Durban	28/10/2021	20-12345-5689	SP2020	S		Scheduled Maintenance for DER001 on 06	Nov 20
WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			5	₽ PRJ0000094	Scheduled Maintenance for YES001 on 06 I	Nov 201
WO0006226	BathBinMaint - Bathroom Bin Maintenan	Durban	27/10/2021	19-12345	SP1919	5		Scheduled Maintenance for TIA001 on 06 M	Nov 201
WO0006225	WS - Weekly Service	Durban	26/10/2021	SP19-12185274	SP19-123456	5		Site Inspectino	
WO0006223	1MMS - 1 Month Machine Service	Durban	26/10/2021	147708	SP2020	5		Install Machines	
WO0006222	WS - Weekly Service	Durban	26/10/2021			5	➡ PRJ0000100	Machine inspection required	
WO0006221	1MMS - 1 Month Machine Service	Durban	23/10/2021	19-123456	SP19-123456	5		Scheduled Maintenance for HOP001 on 14	May 20
WO0006219	BathBinMaint - Bathroom Bin Maintenan	Durban	20/10/2021	19-12345	SP1919	5		Scheduled Maintenance for DER001 on 14	May 20
WO0006218	WS - Weekly Service	Durban	19/10/2021	SP19-12185274	SP19-123456	5		Scheduled Maintenance for HOP001 on 14	Aug 20
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en Windows •								1 Version : 2.5.0.4 Example Company v	

- 3. The **Choose Date** screen will display.
- 4. The **date field** will auto populate with the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.

Note that the date for the Project has to match the Request Date of the work order.

5. Click on OK.



	Home	Equipment / Locations Contract	Finance / HR	Inventory N	lainten	ance / Projects	Manufacturing	Procu	rement	Sales :	Service Reportin	ng Utilities	_ 8	1 3
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1	WO0006233	BathBinMaint - Bathroom Bin Maintenan	Durban	03/11/2021	19	S						s		
1	WO0006232	WS - Weekly Service	Durban	02/11/2021	SF	Ok Back						Deal Sale		
1	WO0006231	WS - Weekly Service	Durban	02/11/2021		Processing	5				0	on 06 Nov 2014	ŧ	
1	WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/2021		P) of the string	A.					ance for HOP00	on 06 Nov 2	2014
	WO0006228	1MMS - 1 Month Machine Service	Durban	28/10/2021	20	-						ance for DER001	on 06 Nov 2	014
1	WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			date for which generate project		23/11	/2021	•	ance for YES001	on 06 Nov 20	014
1	WO0006226	BathBinMaint - Bathroom Bin Maintenan	Durban	27/10/2021	19							ance for TIA001	on 06 Nov 20	014
	WO0006225	WS - Weekly Service	Durban	26/10/2021	SF	17-12103274	JF 13-123-130	-		00000030	Site inspectino	2		
	WO0006223	1MMS - 1 Month Machine Service	Durban	26/10/2021	14	7708	SP2020	S	E P	RJ0000099	Install Machines			
	WO0006222	WS - Weekly Service	Durban	26/10/2021				S	E P	RJ0000100	Machine inspectio	n required		
1	WO0006221	1MMS - 1 Month Machine Service	Durban	23/10/2021	19	-123456	SP19-123456	S	E P	RJ0000101	Scheduled Mainte	nance for HOP001	on 14 May 2	2015
	WO0006219	BathBinMaint - Bathroom Bin Maintenan	Durban	20/10/2021	19	-12345	SP1919	5	E P	RJ0000102	Scheduled Mainte	nance for DER001	on 14 May 2	2015
	WO0006218	WS - Weekly Service	Durban	19/10/2021	SP	19-12185274	SP19-123456	5	E P	RJ0000103	Scheduled Mainte	nance for HOP00	on 14 Aug 2	014
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- 6. The Process Complete message will display informing you that;
 - 2 new project(s) created.
- 7. Click on OK.

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WO0006249	BathBinMaint - Bathroom Bin Maintenan	Durban	23/11/2021	19-12345	SP1919	5	▶ E PRJ0000071	SP240 New Deal.
WO0006248	WS - Weekly Service	Durban	23/11/2021	SP19-12185274	SP19-123456	5	PRJ0000075	Check Technician Assignment
WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021			P		Test Projects viewed in Customer screen
WO0006237	WS - Weekly Service	Durban	09/11/2021	SP19-12185274	SP19-123456	S		New machine installation
WO0006236	WS - Weekly Service	Durban	09/11/2021		-	S	PRJ0000085	tst
WO0006235	Tier - Commercial Tier Test	Durban	06/11/ Proces	s Complete 🚽 🛛 🗙	SP1020	I	E PRJ0000087	SP240 New Deal
WO0006233	BathBinMaint - Bathroom Bin Maintenan	Durban	03/11/	6	SP1919	S	PRJ0000089	Machine installations
WO0006232	WS - Weekly Service	Durban	02/11/ 2 new	project(s) created.	SP19-123456	S	PR30000090	Sprint SP1912 New Deal Sale
WO0006231	WS - Weekly Service	Durban	02/11/			5	PRJ0000091	Service for HOP001 on 06 Nov 2014
WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/			S	PRJ0000092	Scheduled Maintenance for HOP001 on 06 Nov 201
WO0006228	1MMS - 1 Month Machine Service	Durban	28/10/ 7	ОК	SP2020	S	PRJ0000093	Scheduled Maintenance for DER001 on 06 Nov 2014
WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			S	PRJ0000094	Scheduled Maintenance for YES001 on 06 Nov 2014
WO0006226	BathBinMaint - Bathroom Bin Maintenan	Durban	27/10/2021	19-12345	SP1919	5		Scheduled Maintenance for TIA001 on 06 Nov 2014
WO0006225	WS - Weekly Service	Durban	26/10/2021	SP19-12185274	SP19-123456	5	PRJ0000098	Site Inspectino
WO0006223	1MMS - 1 Month Machine Service	Durban	26/10/2021	147708	SP2020	S	PRJ0000099	Install Machines
WO0006222	WS - Weekly Service	Durban	26/10/2021			S		Machine inspection required
WO0006221	1MMS - 1 Month Machine Service	Durban	23/10/2021	19-123456	SP19-123456	S		Scheduled Maintenance for HOP001 on 14 May 201
WO0006219	BathBinMaint - Bathroom Bin Maintenan	Durban	20/10/2021	19-12345	SP1919	S	PRJ0000102	Scheduled Maintenance for DER001 on 14 May 201
WO0006218	WS - Weekly Service	Durban	19/10/2021	SP19-12185274	SP19-123456	S		Scheduled Maintenance for HOP001 on 14 Aug 201
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- 8. The newly created projects will be displayed in the **Project Work Orders** frame.
- Click on the Expand icon of the new projects to view the Assigned Work Orders frames.

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WO000030	7 1MMS - 1 Month Machine Service		1		Δ.	signed We	ork Order	s							1.
WO000030	6 BathBinMaint - Bathroom Bin Maintenance		1			VOCode		WOType	Descrip	tion					
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WO000030	3 AirMaint - Airfreshner Maintenance		1		PR 300	00419	Schedule	d Maintenance for	on 20211	.123					2
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