Monday - Putting Customer Machines On Stop

Correct process for placing a customer on /off stop

🕸 Difficulty **Very easy**	🕐 Duration **1 minute(s)**

Contents

Introduction

It is important that everyone does this the same way or confusion and frustration will follow.
It is also important to understand how the relationship between a Machine and it's contract works

- Each machine on the "Machine" board needs to link to a "Contract" on the "Service Contracts" board
- This allows multiple Machines to have the same "Contract" – eg Customade group contract
- The "Contract" is the electronic version or equivalent to the bit of paper that the customer has signed, and contains the start and end dates, etc
- For machines that have no contract, I have set up some other "General" contract types. These General Types are not machine specific –
  - PAYG – General Pay as you go
  - OnStop – Customer is on stop and nothing should be supplied
  - AskFirst – Ask KG or management first before supplying goods and services
  - Proforma – Payment required before supply of goods and services
  - PreDelivery – Before warranty starts

Step 1 - Putting a customer's machines "on stop" or "on hold"

1. Open the Machines board
2. In the "Search / Filter Board" oval box at the top left, Filter by the customer name (just a few letters are needed)
3. Click on the "Service Contract" column
4. Type "General" and then select "General On Stop" or "General On Hold"

Repeat for each machine this applies to (some machines may be under warranty)

Step 2 - 2. Putting a customer's machines back onto contract following "on stop" or "on hold"

1. Open the Machines board
2. In the "Search / Filter Board" oval box at the top left, Filter by the customer name (just a few letters are needed)
3. Click on the "Service Contract" column
4. Type a few letters of the customer name and then select the appropriate existing contract