

PM Schedules

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Main Menu

Customer Orders	Inventory	Transactions	Purchasing
<ul style="list-style-type: none">LoadCreate From Stock StatusCreate From UsageCreate For RestockCreate From RequestsCreate From RfqBill Of Lading PrintEditRestoreCopyInquiryReportsLine Audit ReportQuotingShipper Edit/InquiryShipper ReportsRequestsAcknowledgementsReceivingReceive By PoReceive (Co)Receipt Report	<ul style="list-style-type: none">LoadEditCopyInquiryStock Status ReportsHistorical ReportsAdjustmentsRecoveryKanban	<ul style="list-style-type: none">Load DisbursementsInventory Count With UsageInventory Count With AdjustInventory CountEdit TransactionsReview And Stamp UsageUsage RequestsInventory TransfersLocation TransfersTransfer PrintInventory Put Away	<ul style="list-style-type: none">EditInquiryApprovalReceivingReceipt ReviewAcknowledgementReturnsPo ReportsReceipt ReportLine Audit ReportSources MenuBuyers MenuRfq Menu
Billing	Asset Management	Miscellaneous	Imports & Exports
<ul style="list-style-type: none">Load InvoiceLoad Invoice From PoInvoice EditInvoice InquiryInvoice ReportsBillable Trans. Reports	<ul style="list-style-type: none">Pm TasksWork OrdersBill Of MaterialsMaster KitsMachinesRepair	<ul style="list-style-type: none">Supplier CatalogCustomer CatalogMfg CatalogEdit LoginManage Saved ReportsAdministrative FunctionsCustomer InquiryItem Label Print	

This option loads PM's for existing Machines / Assets

PM Schedules



To load a PM against a machine click edit

PM Schedules

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Edit machine

* Machinee: 10011 Master MachineID: FORK TRUCK 121 Plant Loc.: BACK ROOM

Customer: CHY CHYRSLER Fac / Loc: 1 / A

Department: 100 ? Make: caterpillar Model: a-112 SerialID: 7166253

Description: CRIB FORK TRUCK Notes: PAST WARRANTY


Show PMs Show Attachments

Add Items Add PM Add PM From Task Create Work Order Done Delete

Part	M.Qty	M. BOH	BOH/Bin	Description	Notes
#1 I: 042-052-566-02 S: 042-052-566-02 C: 10120 More Usage	0	0	13 9214	ELEMENT 042-052-566-022 319FP HEATER 1411 1412 1413 CHROMALOX 1200W 240V 3/8X17" 24" SS SHIELD 90 DEG COPPER END 4IN WIRE HANGING OUT	

Select Add PM from Task to use a preset Task
Or to manually create a schedule click add PM

PM Schedules

Load New PM For Machine [10011] From Task ... Close 

	Create	TaskID	PMDescription	Requestor	ServiceLevel	PriorityLevel	EstimatedDays	Schedule	# Instructions
1	<input type="button" value="Create"/>	1	PM					None	1
2	<input type="button" value="Create"/>	2	22					None	0
3	<input type="button" value="Create"/>	3	INSPECT AND LUBRICATE MACHINE	HEATHER	1		7	Every 10 Weeks	1

7pt 8pt 9pt 10pt

Pick the proper Task and it will then be used on the PM

PM Schedules

Edit Machine PM			
*MachineID	10011	PM #	5
TaskID	3	Customer	CHY
	CHYRSLER	Fac / Loc	1 / A
Service Level	1	Estimated Days	7
PM Description	INSPECT AND LUBRICATE MACHINE	Instructions	FIND MANAUL IN MISC DRAWER
		Notes	
		Show Instruction List	Show Attachments
Work Order Fields	Service Date: 01/26/2022	Schedule: Every 10 Weeks	Change ...
Description		Type (no value) ▼	Priority (no value) ▼
		Requestor	HEATHER ?
	Close	Delete	

This creates a new PM (5) using task (3)

The initial service date is set to today

The service date dictates the next date this schedule will be turned into a Work Order


Once this schedule is turned into a work order then the new service date is set per the schedule

In this case 4/6/2022

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Load Workorder From PM Schedule Load Load From Pm Schedule Inquiry Edit Reports Work Order Menu

*End Service Date 

Customer

Facility

Location

<input checked="" type="checkbox"/>	Select	CustID	Fac	Loc	Machine	PM#	ServiceDate	Schedule	WO Desc	Status	Notes
1	<input type="checkbox"/>	CHY	1	A	10011	5	01/26/2022	Every 10 Weeks			
2	<input type="checkbox"/>	CHY	1	A	1234	1	01/26/2022	Every 10 Weeks			

To create the Work Order from a schedule use the Work Order Create from PM option on the Work Order menu

Select from the list of schedules to be created

Then click create from selected

PM Scheduling

WorkOrder (10059) Notification, Fac/Loc [1/A] Σ Inbox x



Jones Supply <scheduledreports2@dwtrade.net>

to me ▾

WorkOrder#:	10059
Type:	TYP1
Assigned To:	_____
Asset ID:	10011
Asset Desc:	CRIB FORK TRUCK
Problem Type:	PRI2
Department:	100 (DEPT 100)
Brief Desc:	PROPANE PM
Detail Desc:	PAST WARRANTY
Requestor:	1000 (BOB SMITH)
Req. Email:	ken@CHYSLER.com
Req. Phone:	(810) 667-3777
FORK TRUCK SPECS:	https://www.dwtrade.com/ i3Attachments/JON_MCH/FORK TRUCK.jpg

An email is sent to all who are setup for each new work order.

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Edit Machine PM

*MachineID	10011	PM #	5	TaskID	3	WORKORDER OPEN
Customer	CHY	CHYRSLER	Fac / Loc	1	/	A
Service Level	1	Estimated Days	7			
PM Description	INSPECT AND LUBRICATE MACHINE		Instructions	FIND MANAUL IN MISC DRAWER		Notes
						Show Instruction List Show Attachments
Work Order Fields	Service Date:	04/06/2022	Schedule:	Every 10 Weeks	Change ...	
Description			Type	(no value) v	Priority	(no value) v
			Requestor	HEATHER ?		
			Done	Delete		

The PM schedule is changed to represent the new service date.