

Add a Maintenance Service to a Contract, Agreement or Purchase

1. Click the Contract Agreements & Purchases Quick Link

The screenshot displays the VIZOR dashboard for Donald Nathan. The top left features the VIZOR logo. The top center shows the user's name, "Donald Nathan's Homepage". The top right contains "Modify" and "Log Off" buttons. The main content area is divided into two columns. The left column, titled "Quick Links", lists several menu items: "Assets", "Asset Check In / Check Out", "Employees", "Locations", "My Approvals & Actions", "Contract Agreements & Purchases" (highlighted with an orange box and an arrow), "Roles & Policies", and "Vendors and Suppliers". The right column contains two summary cards: "Assets in storage total" showing "19 ASSETS IN STORAGE" and "Requests for my approval" showing "0 APPROVALS". A large, light blue stylized 'V' logo is visible in the background.

2. Click on the Add a new Purchase button on the right

Contract Agreements & Purchases

VIZOR

Reports Password Options Homepage Log Off

Agreements & Purchase Orders

Search for a Purchase...

| ID | Name | Type | Date | PO Number | Invoice Number | Supplier | Total with Tax | Status | Cost Center | |
|------|----------------------|-----------|----------|-----------|----------------|----------------------|----------------|------------|-------------|---|
| 1001 | Device Maintenance | Purchase | 8/5/2019 | -- | 16546126854 | Microsoft Corporatio | \$ 20,000.00 | Active / F | -- |    |
| 1001 | Dell Computer Set | Purchase | 8/5/2019 | -- | -- | Dell | \$ 27,685.00 | Active / F | -- |    |
| 1140 | Pens - General Use | Purchase | 3/1/2019 | 7532 | -- | Amazon | \$ 219.00 | Active / F | -- |    |
| 1120 | Microsoft Visio 2016 | Purchase | 2/24/201 | 5684522 | 52353464 | Insight | \$ 6,751.00 | Active / F | -- |    |
| 1136 | Vizor 2017 | Purchase | 2/22/201 | 351211 | -- | <Direct from Vendo | \$ 2,200.00 | Inactive | -- |    |
| 1059 | SharePoint CAL 201 | Purchase | 2/15/201 | 657654 | -- | <Direct from Vendo | \$ 9,000.00 | Active / F | Cost Cent |    |
| 1134 | Vector Issue Tracker | Purchase | 2/2/2019 | 764322 | -- | <Direct from Vendo | \$ 1,800.00 | Inactive | -- |    |
| 1122 | Windows 7 Professic | Purchase | 1/4/2019 | 868757 | -- | Softchoice | \$ 4,725.00 | Active / F | -- |    |
| 1000 | INV111 | Purchase | 1/1/2019 | PO111 | INV111 | -- | \$ 4,500.00 | Active / F | Cost Cent |    |
| 1146 | Microsoft Office 201 | Purchase | 12/28/20 | PO920282 | -- | Microsoft Corporatio | \$ 540.00 | Active / F | -- |    |
| 1100 | Salesforce | Purchase | 12/12/20 | 823745 | -- | <Direct from Vendo | \$ 27,000.00 | Active / F | -- |    |
| 1098 | Microsoft Agreement | Agreement | 12/5/201 | -- | -- | <Direct from Vendo | 0 | Active / F | -- |    |
| 1096 | Microsoft Office 201 | Purchase | 11/30/20 | PO839211 | INV4549 | Insight | \$ 1,980.00 | Active / F | -- |    |
| 1118 | Microsoft Office 365 | Purchase | 11/20/20 | 546457 | -- | <Direct from Vendo | \$ 11,440.00 | Inactive | -- |    |
| 1108 | Adobe Creative Clou | Purchase | 7/2/2018 | 2207 | -- | <Direct from Vendo | \$ 17,475.00 | Inactive | -- |    |
| 1113 | Microsoft Office 201 | Purchase | 5/11/201 | 76578 | -- | SHI International | \$ 1,500.00 | Inactive | -- |    |
| 1126 | PC-Duo Host 2018 | Purchase | 5/10/201 | 756567 | -- | <Direct from Vendo | \$ 2,016.00 | Active / F | -- |    |
| 1128 | PC-Duo Master 2018 | Purchase | 5/10/201 | 53463464 | -- | <Direct from Vendo | \$ 1,400.00 | Active / F | -- |    |
| 1139 | Adobe Photoshop CS | Purchase | 5/10/201 | 6456 | -- | SHI International | \$ 2,275.00 | Inactive | -- |    |
| 1132 | Vector Issue Tracker | Purchase | 2/2/2018 | 324456 | -- | <Direct from Vendo | \$ 1,800.00 | Inactive | -- |    |
| 1144 | Microsoft Office 201 | Purchase | 12/28/20 | PO123022 | -- | Microsoft Corporatio | \$ 1,500.00 | Active / F | -- |    |

Page 1 of 1 (51 matches)

Add New Agreement

Add New Purchase

3. Fill in the information for the Maintenance service

Contract Agreements & VIZOR

Add New Purchase

Enter the information for the new Purchase.

Name: Status:

PO Number: See More Details: No Yes

Purchase Date:  Supplier:

Auto Renew Purchase: No Yes

Line Items:

| Line # | Asset Type | Product | Quantity | Unit Price | Total | Description | Start Date |
|--------|------------|---------|----------|------------|-------|-------------|------------|
| | | | | | | | |

Total:

Comments:

Taxes:

Total with Tax:

* This color indicates a required field

Page 1 of 1 (51 matches)

4. Click the Add button on the right in the Line Items section

Contract Agreements & **VIZOR**

Add New Purchase

Enter the information for the new Purchase.

Name: Status:

PO Number: See More Details: No Yes

Purchase Date: Supplier:

Auto Renew Purchase: No Yes

| Line # | Asset Type | Product | Quantity | Unit Price | Total | Description | Start Date |
|--------|------------|---------|----------|------------|-------|-------------|------------|
|--------|------------|---------|----------|------------|-------|-------------|------------|

Add...
Edit...
Edit Alerts...
Remove

Total:

Comments:

Taxes:

Total with Tax:

* This color indicates a required field

Finish **Close**

Page 1 of 1 (51 matches)

5. Click OK on the dialog to save the current Purchase. The alert simply warns you to save the currently open purchase first before creating new line items

- A new window will open for the new Line item. Fill in the information for the Maintenance service. Make sure to enter the Duration, the start and end dates and the unit price with the quantity for proper tracking in VIZOR

Add New Line Item
Enter the information for the new Line Item.

Name:

PO Number: Line Item Number: 1

Purchase Order: Sub Type: Maintenance Status: Active / Received

Auto Renewal: Asset Type: Services Product Code:

Line Items: Quantity: 30 Unit Price: \$ 350.00

Description: Microsoft maintenance for Device Assets

Duration: Temporary

Start Date: 8/6/2019 **End Date:** 8/6/2022

Department: IT Infrastructure **Location:**

Project: **License Server:**

GL Account: **Reference ID:**

* This color indicates a required field

Finish Close

Finish Close

Page 1 of 1 (51 matches)

NOTE Make sure that the *sub type* is set to Maintenance

7. Click on Finish. This will save the new Line item and close the window

The screenshot shows the 'Add New Line Item' window in the VIZOR application. The window title is 'Add New Line Item' and it contains the following fields:

- Line Item Number:** 1
- Sub Type:** Maintenance
- Asset Type:** Services
- Quantity:** 30
- Unit Price:** \$ 350.00
- Description:** Microsoft maintenance for Device Assets
- Duration:** Temporary
- Start Date:** 8/6/2019
- End Date:** 8/6/2022
- Department:** IT Infrastructure
- Location:** (empty)
- Project:** (empty)
- License Server:** (empty)
- CL Account:** (empty)
- Reference ID:** (empty)

At the bottom right of the form, there are two buttons: 'Finish' and 'Close'. The 'Finish' button is highlighted with an orange box and an orange arrow points to it. Below the buttons, there is a footer that reads '* This color indicates a required field'.

8. Click OK on the alert that pops up. The alert reminds you that the line item will be created in the background which can be used later

9. Click Finish to save the changes to the purchase and close currently open window

Add New Purchase
Enter the information for the new Purchase.

Name: Status:

PO Number: See More Details: No Yes

Purchase Date: Supplier:

Auto Renew Purchase: No Yes

Line Items:

| Line # | Asset Type | Product | Quantity | Unit Price | Total | Description | Start Date |
|--------|------------|---------|----------|------------|--------------|---|------------|
| 1 | Services | | 30 | \$ 350.00 | \$ 10,500.00 | Microsoft maintenance for Device Assets | |

Total:

Comments:

Taxes:

Total with Tax:

* This color indicates a required field

Finish **Close**