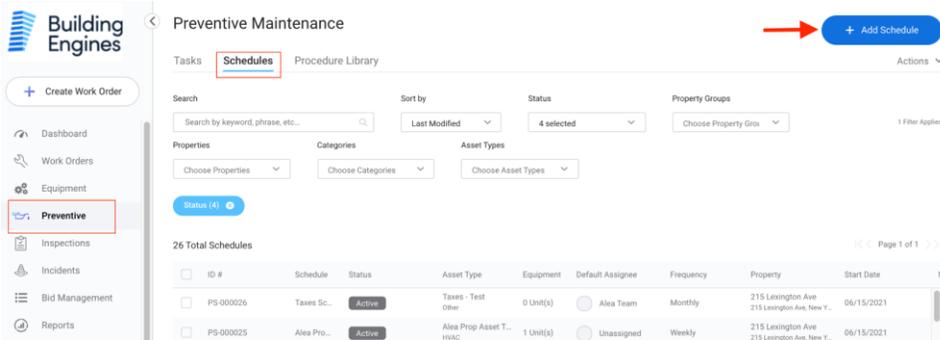


Adding and Editing Schedules

1. Click the Preventive tab and navigate to the Schedules feature
2. To add a schedule, click the blue Add Schedule button in the top right corner of the page.



3. Enter a name for the schedule and select an equipment category, equipment asset type, and a property from the respective drop downs. Click the blue Add Schedule button to continue.

The 'Add Schedule' modal form contains the following fields:

- Name:** A text input field with the placeholder 'Enter Schedule Name'.
- Equipment Category:** A dropdown menu with the placeholder 'Choose a Category'.
- Equipment Asset Type:** A text input field.
- Property:** A text input field.
- Buttons:** A large blue 'Add Schedule' button at the bottom, highlighted with a red arrow.

4. Select an assignee and frequency for the schedule from the respective drop downs.

The screenshot shows the configuration page for a schedule. The location is '65 Seaport Blvd, Boston, MA 02210'. The 'Assignee' dropdown is open, and the 'Frequency' dropdown is also open, showing options like 'Once', 'Daily', 'Weekly', 'Monthly', 'Quarterly', 'Semi-Annual', 'Annual', and 'Custom'. The 'Monthly' option is selected in the frequency dropdown. The 'Start Date' is set to '07/13/2021'. At the bottom, there are buttons for 'Inactivate', 'Save', and 'Activate Schedule'.

5. Enter a start date

6. Under End, select whether you want the schedule to never end, end on a specific date, or end after a certain number of occurrences

7. Select when it is Due. You can choose a custom which will prompt you to enter a number of days for the service.

The image shows two configuration sections. The 'Ends' section has a dropdown menu with 'Never' selected, and options for 'On (Specific date)' and 'After (# of occurrences)'. The 'Due' section has a dropdown menu with 'Custom' selected, and a text input field labeled 'Number of Days' with the placeholder text 'Type Number of Days'.

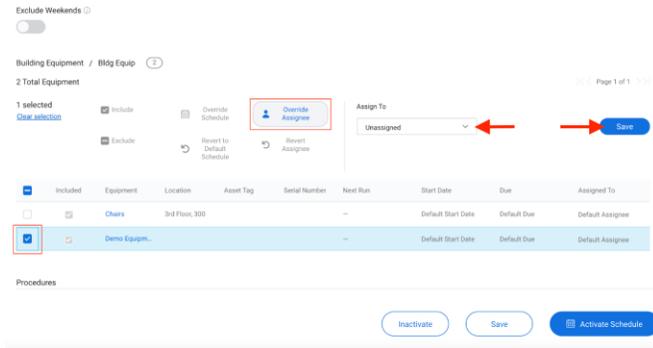
8. To Exclude Weekends, click the grey toggle. If the scheduled date falls on a weekend, it will be moved to the following Monday.

The image shows a 'Number of Days' section with a text input field. Below it is a toggle switch labeled 'Exclude Weekends' which is currently turned on. A callout box points to the toggle with the text: 'When enabled, any tasks scheduled to be created on weekends will be created on the following weekday'.

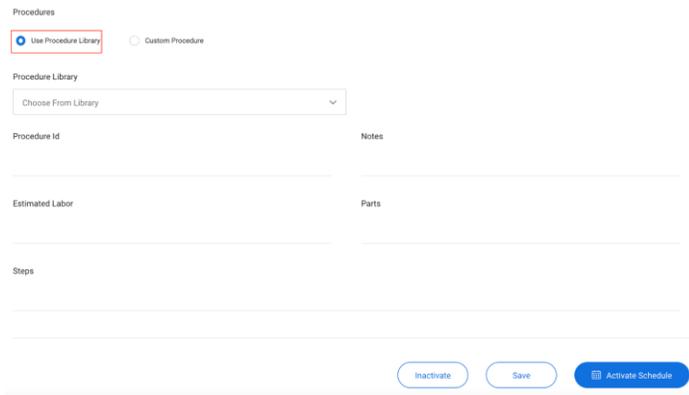
You can override the schedule for a specific piece of equipment by checking the box in front of that equipment on the grid and clicking Override schedule in the above popup. This allows you to change the start date and due by. Click Save when finished.

The image shows a software interface with a grid of equipment. A popup menu is open over one of the equipment items, showing options for 'Override Schedule' and 'Override Assignee'. The 'Override Schedule' option is selected, and a 'Start Date' field is visible with a date of '08/01/2021'. A 'Due' dropdown menu is also open, showing options like 'End of Week', 'End of Month', 'End of Quarter', 'End of Year', and 'Custom'. A 'Save' button is visible at the bottom right of the popup.

You can override the assignee for a specific piece of equipment by checking the box in front of that equipment on the grid and clicking Override Assignee in the above popup. Click Save when finished.

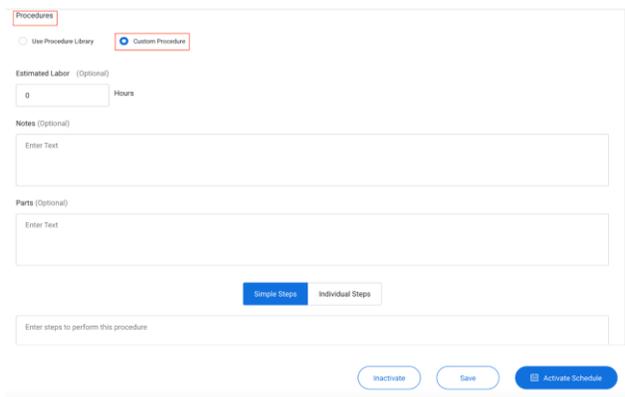


9. Click the circle in front of Use Procedure library to select a procedure from your account library. Enter the procedure ID, estimated labor time, any notes, or parts needed for the procedure.



OR

Click the circle in front of Custom Procedure to enter a custom set of procedures for the schedule. You can enter estimated labor time, notes and parts.



Click Simple Steps to enter one list of steps to perform the procedure OR Click Individual Steps to add each step to the procedure with the ability to check them off as you complete.

10. When finished, click Save at the bottom of the page to save your changes and keep the schedule in the draft stage, OR click the Activate Schedule button at the bottom of the page to save and set the schedule to begin at your chosen start date.

11. To edit schedules, find a schedule in the schedules grid you would like to make changes to. Scroll to the Actions column on the right of the grid and click View in the row of your chosen schedule.

The image displays two screenshots of the 'Preventive Maintenance' Schedules grid. The top screenshot shows a table with columns: ID #, Schedule, Status, Asset Type, Equipment, Default Assignee, Frequency, Property, Start Date, and Next Run. A red arrow points to the 'Next Run' column for the last row. The bottom screenshot shows the same grid with an 'Actions' column added, containing 'View' buttons for each row.

Make any changes to the fields and click the save or activate schedule buttons at the bottom of the page. Save keeps the schedule as a draft, while Activate Schedule sets the schedule to run on its given start date.

Click Inactivate at the bottom of the page to stop running the schedule.

The image shows three buttons: 'Inactivate' (white with blue border), 'Save' (white with blue border), and 'Activate Schedule' (solid blue with white text and a calendar icon).