

QuikOne FSM

User Guide – Preventive Maintenance (AMC)

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12. Preventive Maintenance (AMC)

The **Preventive Maintenance (AMC)** module enables organizations to create and manage customer maintenance contracts for products and equipment. It supports both **Annual Maintenance Contracts (AMC)** and **Comprehensive Maintenance Contracts (CMC)**, allowing organizations to schedule preventive maintenance visits, manage covered assets, define service rules, and automate recurring service delivery.

12.1 Create AMC Contract

Navigation

Customer → Contracts → Create Contract

Overview

The Create Contract screen captures all information required to establish a maintenance agreement between the organization and the customer. Users can define contract details, select the products covered under the agreement, configure pricing, enter contract content, and upload supporting documents.

Contract Details

Enter the basic information for the maintenance contract.

Field	Description
Contract Name	Name of the maintenance contract.
Contract Type	Type of maintenance contract (AMC or CMC).
Contract Template	Contract template used to generate the agreement.
Contract Subject	Subject or title of the contract.
Location	Customer location covered by the contract.
Start Date	Contract commencement date.
No. of Months	Contract duration in months.
End Date	Contract expiry date.
Verified Contract	Marks the contract as verified and officially approved.
Description	Additional notes or description of the contract.

Contract Types

The system supports the following maintenance contract types:

AMC (Annual Maintenance Contract)

Annual Maintenance Contracts generally cover:

- Preventive maintenance visits
- Scheduled inspections
- Routine servicing
- Labour charges (based on organization policy)

Spare parts and consumables may be billed separately unless otherwise specified.

CMC (Comprehensive Maintenance Contract)

Comprehensive Maintenance Contracts typically include:

- Preventive maintenance
- Breakdown maintenance
- Labour charges
- Spare parts replacement
- Consumables (based on contract terms)

CMC provides broader service coverage than AMC.

Execution Type

Contracts can be created for:

Service

Create maintenance contracts based on service offerings.

Product

Create maintenance contracts for installed customer equipment or products.

Product Selection

When **Product** is selected, users can define the products covered under the contract.

Execution Rules

The following execution rules are supported:

- **Specific Product** – Select individual products to be covered.
- **Multi Product** – Cover multiple customer products within the same contract.

Users can:

- Filter products
- Search installed products
- Select one or multiple products
- View product details before adding them to the contract

Displayed product information includes:

- Product Name
- Item Code
- Installation Date
- Brand
- Work Order Status

Financial Summary

The contract automatically calculates financial information based on the selected products and pricing.

The summary includes:

Field	Description
Subtotal	Total contract value before discounts and taxes.
Discount	Discount applied to the contract.
Taxes	Applicable GST or configured taxes.
Grand Total	Final contract amount payable by the customer.

Client Contract Content

The system provides a rich text editor for entering the contract terms and conditions.

Users can:

- Define service scope

- Enter maintenance terms
- Specify customer responsibilities
- Include warranty clauses
- Add legal conditions
- Format contract content using the editor

12.2 Schedule Recurring Services

The **Schedule Recurring Services** feature enables organizations to automatically generate and manage recurring preventive maintenance visits for products covered under an **AMC (Annual Maintenance Contract)** or **CMC (Comprehensive Maintenance Contract)**. Instead of creating individual work orders manually, the system schedules service visits based on the contract frequency and duration.

Navigation

Customer → Contracts → AMC/CMC Contract → Schedule Services

Overview

Recurring service scheduling automates preventive maintenance throughout the contract period. Based on the configured schedule, the system creates service visits and assigns technicians according to business rules.

This feature helps organizations ensure that all contracted maintenance activities are performed on time without manual intervention.

Schedule Configuration

Configure the recurring maintenance schedule for the contract.

Field	Description
Contract	AMC/CMC contract for which services are scheduled.
Product	Product or equipment covered under the contract.

Service Category	Maintenance service category.
Service Type	Type of preventive maintenance service.
Frequency	Defines how often the service is performed.
Start Date	Date of the first maintenance visit.
End Date	Contract expiry date or last scheduled visit.
Number of Visits	Total preventive maintenance visits to be generated.
Preferred Time	Preferred service time for each visit.
Technician	Technician assigned to recurring visits (optional).
Supervisor	Supervisor responsible for monitoring the schedule.
Job Location	Customer site where maintenance is performed.

Automatic Schedule Generation

Once the recurrence is configured, the system automatically generates future service schedules for the entire contract duration.

For each scheduled visit, the system creates:

- Service Schedule
- Planned Service Date
- Customer Information
- Product Information
- Assigned Technician (if configured)
- Maintenance Checklist
- Job Location

Technician Assignment

Recurring maintenance visits can be assigned using different methods:

- Manual technician assignment
- Automatic technician allocation
- Skill-based assignment
- Location-based assignment
- Supervisor allocation

Assignments can be modified at any time before the scheduled visit.

Schedule Management

Users can manage recurring schedules throughout the contract lifecycle.

Available actions include:

- View scheduled visits
- Edit future schedules
- Reschedule individual visits
- Cancel specific visits
- Skip maintenance visits
- Assign or reassign technicians
- Update maintenance instructions

Changes to one occurrence do not necessarily affect all future occurrences unless explicitly configured.

Work Order Generation

Each scheduled maintenance visit generates a corresponding Work Order based on the configured execution date.

The generated Work Order includes:

- Customer details
- Contract reference
- Product information
- Service category and type
- Maintenance checklist
- Assigned technician
- Scheduled date and time
- Job location

Notifications

The system can notify stakeholders when scheduled maintenance is approaching.

Notifications may be sent to:

- Customer

- Assigned Technician
- Supervisor

Typical notifications include:

- Upcoming maintenance reminder
- Technician assignment notification
- Schedule modification
- Service completion confirmation

12.3 Contract Utilization

The screenshot displays the 'Work Order' application's 'Reports' section. The 'Contract Utilization' report is selected in the left sidebar. The main content area shows a table with columns for Contract ID, Contract Name, Allocated Amount, Used Amount, Remaining Amount, Utilization (%), Work Order Count, and Status. Two contracts are listed: Contract 46 (Invoice Contract) and Contract 47 (Contract For Rat). Both show zero usage and remaining amounts. The interface includes a search bar, a 'Back' button, and a 'Items per page' dropdown set to 10, showing 1 - 2 of 2 items.

Contract ID	Contract Name	Allocated Amount	Used Amount	Remaining Amount	Utilization (%)	Work Order Count	Status
46	Invoice Contract	-	-	-	-	-	N
47	Contract For Rat	-	-	-	-	-	N

The **Contract Utilization Report** provides a consolidated view of how customer contracts are being consumed. It helps organizations monitor allocated contract value, actual usage, remaining balance, and work order activity to ensure efficient contract management and timely renewals.

Navigation

Work Order → Reports → Contract Utilization

Overview

The Contract Utilization Report enables service managers and finance teams to track the financial and operational utilization of AMC, CMC, and other customer contracts. It provides real-time visibility into contract consumption and remaining value.

Report Information

The report displays the following information for each contract:

Field	Description
Contract ID	Unique identifier of the customer contract.
Contract Name	Name of the contract.
Allocated Amount	Total contract value allocated for the customer.
Used Amount	Amount consumed through completed work orders, services, or materials.
Remaining Amount	Available contract balance after utilization.
Utilization (%)	Percentage of the contract value utilized.
Work Order Count	Total number of work orders executed under the contract.
Status	Current contract status (Active, Expired, Completed, etc.).