

## Machine/Equipment Maintenance Form

The **Machine/Equipment Maintenance form** is used to place orders for maintenance contracts on machines and other equipment (such as copiers, card printers, card readers, etc.) Be prepared with the manufacturer name, model number, serial number, and the campus location of the machine/equipment.

### Creating a Machine/Equipment Maintenance form

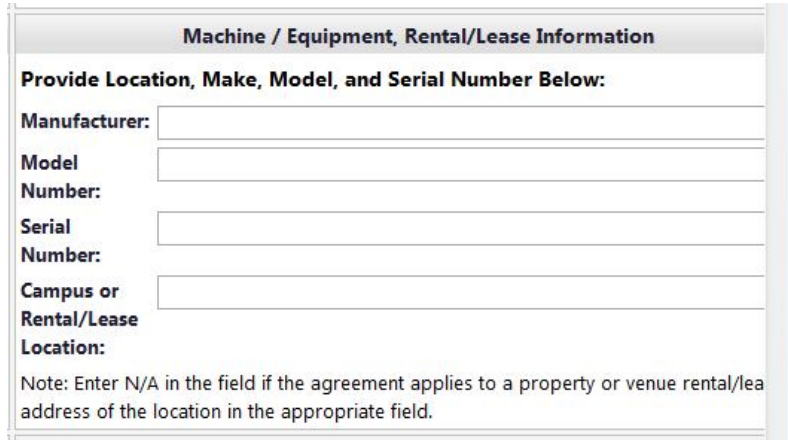
1. Click **forms** on the "Go to:" bar or click **Machine/Equipment Maintenance, Rental/Lease Agreements** listed under UNCG FORMS.

The screenshot shows the UNCG eMarketplace website. At the top, there is a navigation bar with 'Spartie Requestor', 'Action Items', 'Notifications', and a shopping cart icon showing '1,069.97 USD'. Below this is a search bar with a 'Go' button. A callout box points to the search bar with the text 'Click here to access forms...'. Below the search bar is a 'Go to:' bar with options: 'advanced search', 'favorites', 'forms', 'non-catalog item', 'quick order', 'Browse: suppliers', 'categories', 'contracts', 'chemicals'. On the left side, there is a sidebar with 'Welcome to UNCG's eMarketplace!' and links for 'Materials Management/Purchasing Website', 'Change Order/PO Cancellation Request', 'NC State Contract link', 'Training /How-Tos', 'Account Code Listing (alpha by description)', and 'Vendor Taxpayer ID Form'. The main content area has 'Showcased Suppliers' with logos for CAROLINA, Fisher Scientific, VWR INTERNATIONAL, Out for Bid, Alphanumeric, and macthrift. Below that is the 'UNCG FORMS' section with buttons for 'Non-Standard PC Configuration Just...', 'Machine/Equipment Maintenance, Re...', 'Sole Source Purchase & Justificatio...', 'Construction/Services Order', 'Furniture Purchase', and 'Asset Trade In Form'. A callout box points to the 'Machine/Equipment Maintenance, Re...' button with the text '...or you can access the form by clicking here'.

2. Go to the **Supplier/Vendor** section of the form and enter the vendor for this order. If the vendor does not automatically appear, click on Supplier Search and select your vendor, if found. (If this is a new supplier, type in "New Supplier" and follow the **New Vendor Ordering** instructions.)

The screenshot shows the 'Supplier / Vendor' form. The title is 'Supplier / Vendor'. Below the title is the section 'Supplier/Vendor Information:'. The text reads: 'If this is a new supplier, select "New Supplier" from the supplier drop-down list and attach a completed W-9 or UNCG's Taxpayer Request form. Failure to do so will result in delayed processing.' Below this text is a text input field labeled 'Enter Supplier'. Below the input field is the text 'or supplier search'.

- Provide specific information about the property in the **Machine / Equipment Information** section. This includes the manufacturer, model number, serial number and campus location.



**Machine / Equipment, Rental/Lease Information**

**Provide Location, Make, Model, and Serial Number Below:**

Manufacturer:

Model Number:

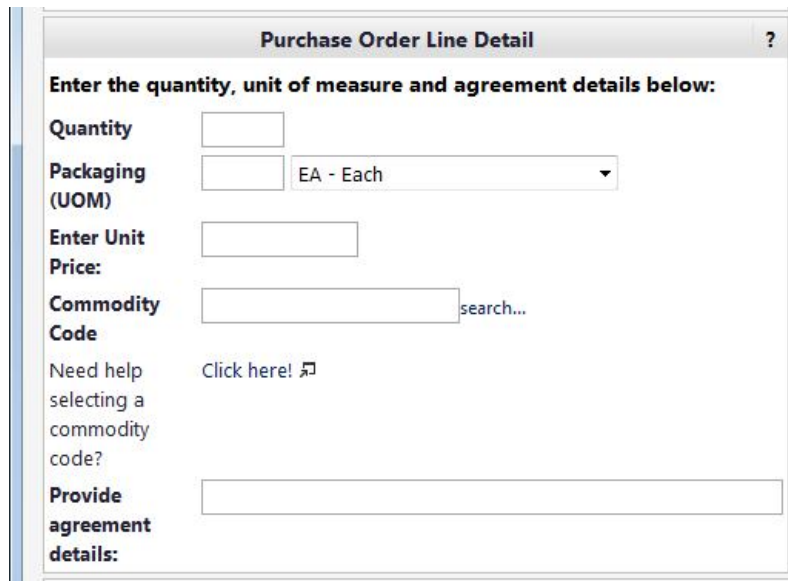
Serial Number:

Campus or Rental/Lease Location:

Note: Enter N/A in the field if the agreement applies to a property or venue rental/lease address of the location in the appropriate field.

- Provide the quantity, unit of measure, unit price and specific agreement details in the **Purchase Order Line Detail** section. NOTE: Some maintenance agreements are set up monthly, where others may be set up as yearly. *If you are unsure which way you will be billed*, enter "12" in the quantity and "MO-Months" for the unit of measure. This way, if you are billed monthly, you can receive one month at a time and if you're billed yearly, you can receive all 12 months at one time.

Provide agreement details – include whether or not parts are included, or labor only, etc. If you have a written agreement, you can put "see attached" in this section and attach the agreement to the form.



**Purchase Order Line Detail** ?

**Enter the quantity, unit of measure and agreement details below:**

Quantity

Packaging (UOM)  EA - Each ▼

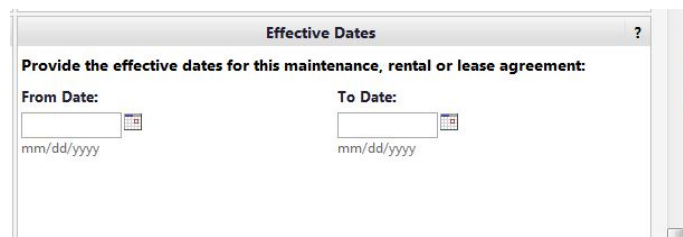
Enter Unit Price:

Commodity Code  search...

Need help selecting a commodity code? [Click here!](#)

Provide agreement details:

- Provide the effective dates for this maintenance agreement. If you are purchasing a yearly contract, make sure the dates span a year. If monthly, provide the 1<sup>st</sup> day of the month to the last day of the month, etc.



**Effective Dates** ?

**Provide the effective dates for this maintenance, rental or lease agreement:**

From Date:  mm/dd/yyyy

To Date:  mm/dd/yyyy

6. Attach any documents that relate to the order. If you put “see attached” in the details section, you must attach the maintenance agreement as an attachment. Internal attachments will only be viewed by departmental representatives or purchasing agents, whereas external documents will also be sent to the vendor.

**Internal and External Attachments**

**Attach a copy of the machine/equipment, rental/lease below:**

<p>It is strongly encouraged that you provide a copy of the machine/equipment maintenance agreement (especially if new or renewal) or the rental or lease agreement for future use and for state reporting purposes.</p>	<p style="text-align: center;">Internal Attachments</p> <p style="text-align: center;">add attachment...</p>	<p style="text-align: center;">External Attachments</p> <p style="text-align: center;">HP Laser Jet.docx (12k)</p> <p style="text-align: center;">add attachment...</p>
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7. Once you have completed the form, you have several options in the Available Actions drop-down list:

**Machine/Equipment Maintenance, Rental/Lease Agreement**

Available Actions: Add and go to Cart Go Close Print

**Instructi  
Agreem**

**You must know the following information to complete this form:**

1. The effective from and to dates of the agreement (ie. 1/1/2010 to 12/31/2010)
2. Make and model of the machine or equipment
3. Serial number
4. Physical campus location of the machine/equipment, or location of pr rental/lease

- **Add and go to Cart** – adds the order to your cart and takes you to the cart.
- **Add to Cart and Return** – adds the order to your cart and returns you to a blank form with the same vendor.
- **Add to Cart** – adds the order to your cart and remain in the form.
- **Add to Draft Cart or Pending PR/PO** – if a draft cart or pending cart exist.
- **Add to Favorites** – adds the completed form to your Favorites.

**Follow the Order/Requisition instructions to complete the order.**