

# Contractor Pro-Forma Template



**C365 Facilities Management System**



# Supplier Quick Reference Guide: Contractor Pro-Forma

## Contractor Pro-Forma

Ensure the information on the pro forma template is accurate.

- 1 **Property Name and Property code.**  
NB this relates to the site where the Planned Preventative Maintenance was completed.
- 2 Add the **Contractor** company name.
- 3 **Activity Date** is when the PPM was carried out.
- 4 Use the **Compliance Activity** from the PPM Helpdesk Request sent to you.

1

Property Name

Newmarket Support Office

2

Contractor

Contractor ABC

3

Property Code

NEWMARKETSUPP

4

Compliance Activity

Annual Thermal Imaging

Activity Date

30/09/2026

Activity Outcome

Pass

Further Works Required

An individual report is to be submitted for each compliance activity

| Action | Description of Remedial Action / Works Required / Recommendations | Risk |
|--------|-------------------------------------------------------------------|------|
| 1      |                                                                   |      |
| 2      |                                                                   |      |
| 3      |                                                                   |      |
| 4      |                                                                   |      |
| 5      |                                                                   |      |
| 6      |                                                                   |      |
| 7      |                                                                   |      |
| 8      |                                                                   |      |
| 9      |                                                                   |      |
| 10     |                                                                   |      |
| 11     |                                                                   |      |
| 12     |                                                                   |      |
| 13     |                                                                   |      |
| 14     |                                                                   |      |
| 15     |                                                                   |      |
| 16     |                                                                   |      |
| 17     |                                                                   |      |

<

>

Activity Report

+

# Supplier Quick Reference Guide: Contractor Pro-Forma

## Contractor Pro-Forma

Ensure the information on the pro forma template is accurate.

5 **Activity Date** is when the PPM was carried out.

6 Use the **Compliance Activity** from the PPM Helpdesk Request sent to you.

7 Input the **Activity Outcome**  
NB This relates to the work outcome, **Pass or Fail**.

8 Advise if **Further Works Required**  
NB the recommendation will be a YES or NO.

**Bupa Compliance Activity Report**

|                          |                          |                    |                |
|--------------------------|--------------------------|--------------------|----------------|
| Property Name            | Newmarket Support Office | Contractor         | Contractor ABC |
| Property Code            | NEWMARKETSUPP            | 5 Activity Date    | 30/09/2026     |
| 6 Compliance Activity    | Annual Thermal Imaging   | 7 Activity Outcome | Pass           |
| 8 Further Works Required |                          |                    |                |

An individual report is to be submitted for each compliance activity

| Action | Description of Remedial Action / Works Required / Recommendations | Risk |
|--------|-------------------------------------------------------------------|------|
| 1      |                                                                   |      |
| 2      |                                                                   |      |
| 3      |                                                                   |      |
| 4      |                                                                   |      |
| 5      |                                                                   |      |
| 6      |                                                                   |      |
| 7      |                                                                   |      |
| 8      |                                                                   |      |
| 9      |                                                                   |      |
| 10     |                                                                   |      |
| 11     |                                                                   |      |
| 12     |                                                                   |      |
| 13     |                                                                   |      |
| 14     |                                                                   |      |
| 15     |                                                                   |      |
| 16     |                                                                   |      |
| 17     |                                                                   |      |

< >

Activity Report

+

# Supplier Quick Reference Guide: Contractor Pro-Forma

## Contractor Pro-Forma

Ensure the information on the pro forma template is accurate.

9 Use the **Description Column** to explain actions or recommendations.

10 Ensure a **RISK** rating is provided., i.e.: **HIGH** or **MEDIUM** or **LOW**

11 Once completed, **SAVE** the document and upload it to the certificates section in the appropriate Helpdesk Request within C365.

**TIP: To save time** pre-fill these templates with company name, compliance type, property name and code ready if you have limited Planned Preventative Maintenance tasks.

**Property Name**

Newmarket Support Office

**Property Code**

NEWMARKETSUPP

**Compliance Activity**

Annual Thermal Imaging

**Further Works Required**

**Contractor**

Contractor ABC

**Activity Date**

30/09/2026

**Activity Outcome**

Pass

< >

Activity Report

+