

# SERVICE

## **INTRODUCTION TO WORK ORDERS**

A work order, or job card is an order for work to be performed for a **Company** or a **Customer**. <u>All</u> transactions concerning this work, such as part issues, labour time, etc. are logged against the work order.

When work is required for a **Customer**, a **Call** is raised. The system will generate a work order in the background. Transactions are logged on the call, but stored against the work order. <u>More than one</u> work order can be linked to a call, for example, when different tasks needs to be performed to complete one call.

When work is required for a **Company**, such as Building Maintenance or a Machine Repair, then a work order needs to be raised **manually**.

- If the work is for Building Maintenance, or Training, then the work order must be linked to a **functional location**, which must be set up before hand.
- If the work required is for an **asset**, e.g. repair a machine in store to be sold refurbished, then the machine is linked to the **call**.
- Manual work orders can be linked to a **project** to group them, e.g. at the beginning of the year create a project for 'Non Stock Company Purchases', create a work order each month to raise nonstock requests and transactions. Each work order is closed at the end of the month and the project is closed at the end of the year.
  - This is good practice for when logging a great deal of transactions through manual work orders.



If not, stick to one work order per requirement, e.g.
 Training, Maintenance, and keep the work order open.

Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site* you wish to work in.
  - The example has Durban selected.
- 3. The screen lists all **Open** work orders by default.
  - Select the work order status you require.



#### Introduction to Work Orders

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			± W	00000214	TON	CN0000057	Deliver full set of toners			Deliver full set of toners	08/08/2014	2	No	
Loar			€ W	00000215	NDS	CN0000058	New machine			New machine	08/08/2014	2	No	
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### **RIBBON ACTION BUTTONS**

The Work Order ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

Use the Maintain buttons to <u>Add</u>, <u>Edit</u>, <u>Delete</u> and <u>View</u> a work order.



#### Introduction to Work Orders

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Services	▶ E WO0000183	SERV	CN0000040	Service machine S/N: 1912-102036	No	Service machine S/N: 1	21/07/2014	2	No	]
	E WO0000185	REP	CN0000042	Machine repair needed		Machine repair needed	21/07/2014	2	No	
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Parts	WO0000208	DR	CN0000056	Contract Closure - CO0000021		Contract Closure - CO	07/08/2014	2	No	
	WO0000213	NDS		Housing Project			08/08/2014	2	No	PR.
	E WO0000214	TON	CN0000057	Deliver full set of toners		Deliver full set of toners	08/08/2014	2	No	
Loans	E WO0000215	NDS	CN0000058	New machine		New machine	08/08/2014	2	No	
	WO0000216	TON	CN0000059	Full set of toners required		Full set of toners requi	08/08/2014	2	No	
	E WO0000217	NDR	CN0000060	Machine Rental Deal		Machine Rental Deal	08/08/2014	2	No	
Swap Outs	WO0000230	DR		Check technician assignment	No		18/08/2014	2	No	PRJ
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		TON	CN0000061	Toner to be delivered		Toner to be delivered	19/08/2014	2	No	

Use the *Process* buttons to *Close*, <u>Complete</u> or <u>Reinstate</u> a selected work order.

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	· WO0000135	NDR		SP19-12IR - SP19-12 Inhouse Rental	No		21/06/2014	2	No	PRJ
	· WO0000173	NDS		SP1912 NDS 1 - Machine installation	No		03/07/2014	2	No	PRJ
Services	▶ E WO0000183	SERV	CN0000040	Service machine S/N: 1912-102036	No	Service machine S/N: 1		2	No	7
	E WO0000185	REP	CN0000042	Machine repair needed		Machine repair needed	21/07/2014	2	No	4
	WO0000191	TON	CN0000044	1 black toner for collection		1 black toner for collec	28/07/2014	2	No	
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	₩O0000216	TON	CN0000059	Full set of toners required		Full set of toners requi	08/08/2014	2	No	
	E WO0000217	NDR.	CN0000060	Machine Rental Deal		Machine Rental Deal	08/08/2014	2	No	
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The <u>Print</u> button will generate a Work Order Report for the selected work order. Use the *Export* button to export the list of Work Orders in the required status to an Excel Spreadsheet.

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		WO0000213	NDS		Housing Project				08/08/2014	2	No	PRJ
		E WO0000214	TON	CN0000057	Deliver full set of toners			Deliver full set of toners	08/08/2014	2	No	
Loar	ns	WO0000215	NDS	CN0000058	New machine			New machine	08/08/2014	2	No	
		WO0000216	TON	CN0000059	Full set of toners required			Full set of toners requi	08/08/2014	2	No	
		WO0000217	NDR	CN0000060	Machine Rental Deal			Machine Rental Deal	08/08/2014	2	No	
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Use <u>Find WO</u> to search for a specific Work Order by typing in the Work Order number.



#### Introduction to Work Orders

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			• W	00000173	NDS		SP1912_NDS_1 - Machin	ne installation	No		03/07/2014	2	No	PRJ
Se	Services		• 🖭 W	00000183	SERV	CN0000040	Service machine S/N: 19	912-102036	No	Service machine S/N: 1	21/07/2014	2	No	1
			± w	00000185	REP	CN0000042	Machine repair needed			Machine repair needed	21/07/2014	2	No	
			± w	00000191	TON	CN0000044	1 black toner for collecti	ion		1 black toner for collec	28/07/2014	2	No	
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			± w	00000213	NDS		Housing Project				08/08/2014	2	No	PRJ
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LO	ans		± w	00000215	NDS	CN0000058	New machine			New machine	08/08/2014	2	No	
			± w	00000216	TON	CN0000059	Full set of toners require	ed		Full set of toners requi	08/08/2014	2	No	
			€ W	00000217	NDR	CN0000060	Machine Rental Deal			Machine Rental Deal	08/08/2014	2	No	
Sw	ap Outs		± w	00000230	DR		Check technician assign	ment	No		18/08/2014	2	No	PRJ
			± w	00000231							01/01/1900	0	No	PRJ
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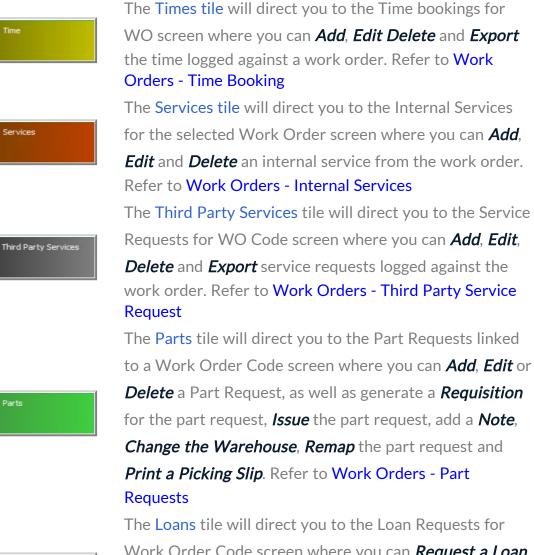
Click on *Reports* to select Custom Work Order report(s) from the reports drop-down menu.

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			WO00001	35 NDR		SP19-12IR - SP19-12 Inhouse Rental	No		21/06/2014	2	No	PRJ
-			B WO00001	73 NDS		SP1912_NDS_1 - Machine installation	No		03/07/2014	2	No	PRJ
Se	rvices	۲	E WO00001	83 SERV	CN0000040	Service machine S/N: 1912-102036	No	Service machine S/N: 1	. 21/07/2014	2	No	
			E WO00001	85 REP	CN0000042	Machine repair needed		Machine repair needed	21/07/2014	2	No	
				91 TON	CN0000044	1 black toner for collection		1 black toner for collec	28/07/2014	2	No	
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Pa	rts			08 DR	CN0000056	Contract Closure - CO0000021		Contract Closure - CO	07/08/2014	2	No	
				13 NDS		Housing Project			08/08/2014	2	No	PRJ
			E ₩000002	14 TON	CN0000057	Deliver full set of toners		Deliver full set of toners	08/08/2014	2	No	
Lo	ans			15 NDS	CN0000058	New machine		New machine	08/08/2014	2	No	
				16 TON	CN0000059	Full set of toners required		Full set of toners requi	08/08/2014	2	No	
				17 NDR	CN0000060	Machine Rental Deal		Machine Rental Deal	08/08/2014	2	No	
Sw	ap Outs		E ₩000002	30 DR		Check technician assignment	No		18/08/2014	2	No	PRJ
				31					01/01/1900	0	No	PRJ
			WO00002	32 TON	CN0000061	Toner to be delivered		Toner to be delivered	19/08/2014	2	No	



#### **FUNCTION TILES**

The Functions panel is also available from the Work Order Listing and the Maintain Work Order screen.



Work Order Code screen where you can *Request a Loan* Unit, Edit and Delete the Loan Unit, Request a Loan Unit Return and Print the Loan Unit Delivery and Loan Unit Return Notes. Refer to Work Orders - Loans



Parts





The Swap Outs tile will direct you to the Swap Outs for WO Code screen where you can Add a Swap out and Export the list of Swap Outs for the work order. Refer to Work Orders - Swap Outs

Meters

The Meters tile will direct you to the Meters for WO Code screen where you can *view* and *edit* the meter readings for equipment linked to the work order. Refer to Work Orders - Meters



Travel 1

The Expenses tile will direct you to the Expense Claims for work order screen where you can *Add*, *Edit* or *Delete* an expense claim. Refer to Work Orders - Expenses The Travel tile will direct you to the Travel Claims for Work Order screen where you can *Add*, *Edit* or *Delete* travel claims for the Work Order. Refer to Work Orders -Travel



The Documents tile will direct you to the Documents for Work Order screen where you can *Add*, *Edit*, *Delete* and *View* the documents linked to the Work Order. Refer to Work Orders - Documents

The Warranty Issued tile will direct you to the Issued Warranties for Work Order Code screen where you can *Add*, *Edit* and *Delete* warranties for the items linked to the Work Order. Refer to Work Orders - Warranties Issued

The Instructions tile will direct you to the Instructions for Work Order Codes screen where you can *Add*, *Edit*, *Delete* and *Complete* an instruction. Refer to Work Orders - Task Instructions

The Images tile will direct you to the Images or Work Order Code screen where you will be able to view the names of employees, image stock and the dates images were linked to the work order. Refer to Work Orders -Images



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The Work in Progress tile will direct you to the Work in Progress for Work Order Code screen where you can view stock or internal assets that have been issued, as well as Third Party Services that were delivered. From here you can do a *Return Request*, *Invoice a work order* or *Invoice a Call*. Refer to Work Orders - Work in Progress (WIP)

The Maintenance tile will direct you to the Maintenance Methodology for Asset / Location screen. From here you can *Add*, *Edit* or *Delete* a scheduled task. Refer to Work Orders - Maintenance

The Time Review tile will direct you to the Time Not Billed for Work Order code screen where you can *Invoice a WO* or *Invoice a Call, Flag time as Reviewed*, view the *SLA Time*, or *View the Work Order* or *Call*. Refer to Work Orders - Time Review

#### **PROCESSING TILES**



Time Review

The Quotes tile will direct you to the Sales Quotes for Work Order screen where you can *Add*, *Edit*, *Delete* and *View* a quote as well as do the necessary processing like, *Accept*, *Reject*, *Covert* or *Clone* a Quote. Refer to Work Orders - Sales Quotes

The Orders tile will direct you to the Sales Orders for Work Order screen where you can Add, Edit, Delete and View a sales order. You can also do the necessary processing like, Create Invoice, Create New Deal, Add Items to Work Order and do a New Deal Project as well as Print a the Sales Order and Proforma Invoice. Refer to Work Orders - Orders







The Invoices tile will direct you to the Sales Invoices for Work Order screen where you can *Add*, *Edit* and *View* the sales invoice. You also have the facility to add a *Comment and Reference*, *Print the Invoice* and *Send Invoices To Print Queue*. Refer to Work Orders -Invoices

The Credit Notes tile will direct you to the Sales Credit Notes for Work Order screen where you can *Add*, *Edit*, *Delete* and *View* a credit note, as well as do the necessary processing like *Release for Approval*, *Remove from Approval*, *Approve Cr Note* and *Reject Cr Note*. You can also *Print* the credit note and *Send Cr Notes to Print Oueue*. Refer to Work Orders - Credit Notes

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Credit Notes

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