

We are currently updating our site; thank you for your patience.

PROJECTS AND WORK ORDERS

INDEX

PROJECTS

- [Introduction to Projects](#)
- [Add a Project](#)
- [Assign a Technician to a Project](#)
- [View Work Orders linked to a Project](#)
- [Link a Work Order to a Project](#)
- [Link Delivery Address](#)
- [Work Orders - Link Customer Contact](#)
- [My Projects](#)
- [Project Progress](#)
- [Project Budget](#)
- [Closing a Project](#)

PROJECT REQUESTS

- [Request Parts](#)
- [Request Parts from a BOM](#)
- [Part Request Author-](#)

PROJECT METHODOLOGY

- [Standard Methodology - Add Main Layer - Setting up Project Methodology](#)
- [Apply a Methodology to a Project](#)
- [Apply a Methodology to a Sales Quote](#)

MY WORK

- [Introduction to My Work](#)
- [View Assigned Workload](#)
- [Edit Work Description and Comments](#)
- [View Customer Details / View Customer](#)
- [Log a Part Request](#)
- [Log a Service Request](#)
- [Log Internal Service Request](#)
- [Log Time](#)
- [Log Expenses](#)
- [Log Travel](#)
- [View / Add Meter Readings](#)
- [View / Edit / Add Planned](#)

isation

- [Request Services](#)

PROJECT UPDATES

- [Log Labour Time](#)
- [Log Expenses](#)
- [Log Travel](#)
- [Print Project Net Delivery Report](#)

PROJECT BILLING

- [Create a Quote from a Project](#)
- [Create an Order from a Project](#)
- [Create an Invoice from a Project](#)
- [Create a CR Note from a Project](#)

WORK ORDERS

- [Location Configuration](#)
- [Introduction to Work Orders](#)
- [Log a Manual Work Order](#)
- [Editing Work Order Details](#)
- [Assign Work Sched-](#)

[Maintenance Tasks](#)

- [Loan Unit Processing](#)
- [View/Link Documents](#)
- [Raise a Quote](#)
- [Print Call Report](#)
- [Print WO Report](#)
- [Print Service History](#)
- [Complete a Work Order](#)
- [Raise a Work Request](#)
- [Approve or Decline a Work Request](#)

WORK MANAGEMENT

- [Introduction to Work Management](#)
- [View Open Work Orders](#)
- [Edit a Work Order](#)
- [Assign a Technician](#)
- [Print Call Report](#)
- [Print Call Net Deliveries](#)
- [Print WO Report](#)
- [Print Service History](#)
- [Complete a Work Order](#)
- [Close a Work Order](#)
- [Raise a Work Request](#)
- [Approve or Decline a Work Request](#)

WORK IN PROGRESS

- [Service WIP \(Work in Pro-](#)

- [View Required Crafts](#) ([gross](#))
- [Assign Employees](#)
- [Requesting Parts / Request Types / Authorisation](#)
- [Loan Units](#)
- [Log Labour Time](#)
- [Subcontractor Requests / Set to Bill or Not Bill](#)
- [Internal Services](#)
- [Expense Claims](#)
- [Travel Claims](#)
- [Digital Documents](#)
- [Scheduled Maintenance](#)
- [View Warranties](#)
- [View Task Instructions](#)
- [View / Add Sales Quotes](#)
- [Update Rectification Comments](#)
- [Complete a Work Order](#)
- [Closing a Work Order](#)
- [Re-instate a Work Order](#)
- [Find by WO Code](#)

WORK ORDER ALLOCATION

- [Searching and Filtering](#)
- [Editing Columns](#)
- [Link Work Orders\(s\) to a Current Project](#)
- [Link Work Orders\(s\) to a New Project](#)
- [Unlink Work Order\(s\)](#)
- [Auto Create Projects](#)

WORK ORDER REPORTING

- [Print a Manual Work Order](#)

TECH CONNECT

- [Using Tech Connect](#)

BPO.RSI.013