

Work, Work, Work *Repairing your customer's equipment can be a very profitable part of your business. This class will detail the work order process and demonstrate some tools you probably have not been using.*

The Work Order process is used to generate income by selling services and goods to a customer. It is most commonly used for repairs and maintenance to your customer's equipment, but some event companies use it to track the washing of linens or tents for their customers.

1. Preliminary preparation

- a. Work Order Items - File Maintenance\Item file\ Key starts with WO- or WO#####(Cusn #)-### (Unit #)
- b. Work Order Questions - #9 Configuration\ Transaction Configuration\ Contract Questions
- c. Work Order Formats- #9 Configuration\ System Configuration\ Work Order Formats
- d. Creating Operations- #9 Configuration\ Transactions Configuration\ Transaction Operations
- e. Technicians/Mechanics as tracking Items - mechanics as items in database

2. Work Order Process

- a. Opening the work order-
- b.
 - I. Contract Questions
 - II. Operations
 - III. Creating Customer Work order items
 - IV. Assigning Operators
 - V. Notifications
 - VI. Work Order Label\ Load Slip
 - VII. Changing to a Quote
- b. **Modifying the work order**
 - I. Adding parts/Special Order items
 - II. Ordering parts - Add Labor Items(Shop Show Mechanics)
 - III. Contract Link - Shows PO#
 - IV. Contract Comments- note repairs done
 - V. Call logs for customer communications
- c. **Closing\completing the contract**
 - I. Leave contract open until customer pays and receives equipment.
 - II. Printing Invoice
 - III. Re-opening Work order

3. Day at a Glance

- a. Setting Columns
- b. Operations
- c. Contract link for PO Info
- d. Call Logs
- e. Operator Assigned
- f. Creating Reminders

4. Interface with Purchase Order

- a. PO approval required
- b. Notifications

5. Work Order Reports

- a. Work Order Pending
- b. Work Order Detail

6. Scheduling work order maintenance.

File Maintenance

- a. History - The WO item will have the customer number in the key. This is how you will track the WO back to the customer. To see WO items Part number has to be checked.
- b. Item Maintenance