



U4L094

Service Order Forms or Checklist

Roll Call





Recap of the Lesson

✗
What is work order?



Work Order

It is a document managers authorize for workers to complete tasks. Also known as a job order or a service order, work orders are commonly used to manage maintenance operations across industries.

Maintenance Work Order Form

Client/Worksite Details	
Client Name:	Client Phone Num:
Client Address:	Client Email:
Order Details	
Date Issued:	Work Order Number:
Issued By:	Work Performed by:
Description of Work Required:	
Material Required:	
Completion Information	
Date Completed:	Time Required:
Materials Used:	
Remarks:	
EMPLOYEE SIGNATURE:	Date:
SUPERVISOR SIGNATURE:	

Work Order

A work order is a job or task being requested by a customer, another business entity, or internally.

Maintenance Work Order Form

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Work Order

A common scenario for requesting a work order is when a need for preventive maintenance or repairs is identified. Work order forms assist both parties the requestor and the person assigned in formally documenting what the job or task entails.

Maintenance Work Order Form

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SUPERVISOR SIGNATURE:	

**What is the
importance of Work
Order?**



Work orders constitute the heart of any **maintenance management system**. Not only are they simple tools for scheduling and assigning **job tasks**, but they also help monitor the variety of resources spent on maintenance.

[illegible]

It also serves as one of the integral components of field **service management** with field service reports. Work orders are important because they play an essential part in standardizing **maintenance workflows**, particularly that of submitting work requests to closing work orders.

[illegible]

What is the difference
between work order
and work request? As
well as purchase
order?



Work Order VS Work Request

The difference between a work order and a work request is their **source and sequence**, or where they originated and when they're triggered.

Generally, **work requests come from non-maintenance personnel**, leading to the creation of maintenance work orders.

WORK REQUEST FORM		Format No.: Rev. No. : Rev. Date. :	
Date of Issue	Date of Received:		
Issued by:	Received by:		
Issued Location:	Received Location:		
Reason for Issue		Type of Defects / Problem	
Type of Defects / Problem - Description		Requester Sign.	Receiver Sign
Actions Taken		Target Date	
Remarks	Completion on	Signature	

[illegible]

For example, machine operators usually submit a work request for an equipment problem first, and then maintenance managers approve a WO designated to mechanics.

[illegible]

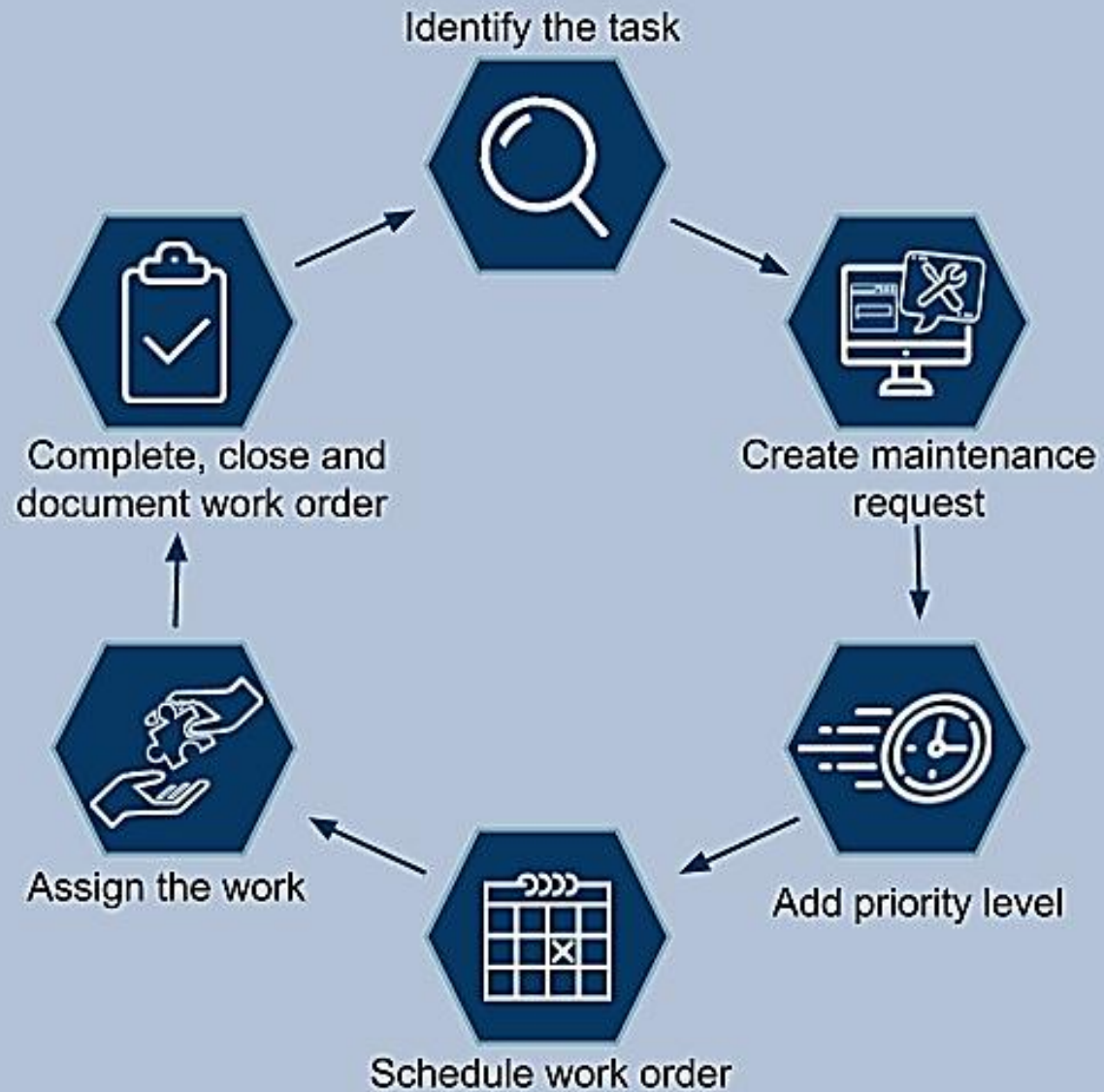
The difference between a work order and a purchase order (PO) is how they're used in connection with maintenance work order workflows. While work orders detail specific tasks or services to be carried out, purchase orders itemize materials or products required to complete a WO.

[illegible]

Typically, a work order includes a PO with the new parts and items to be used when repairing or servicing a piece of equipment.

[illegible]

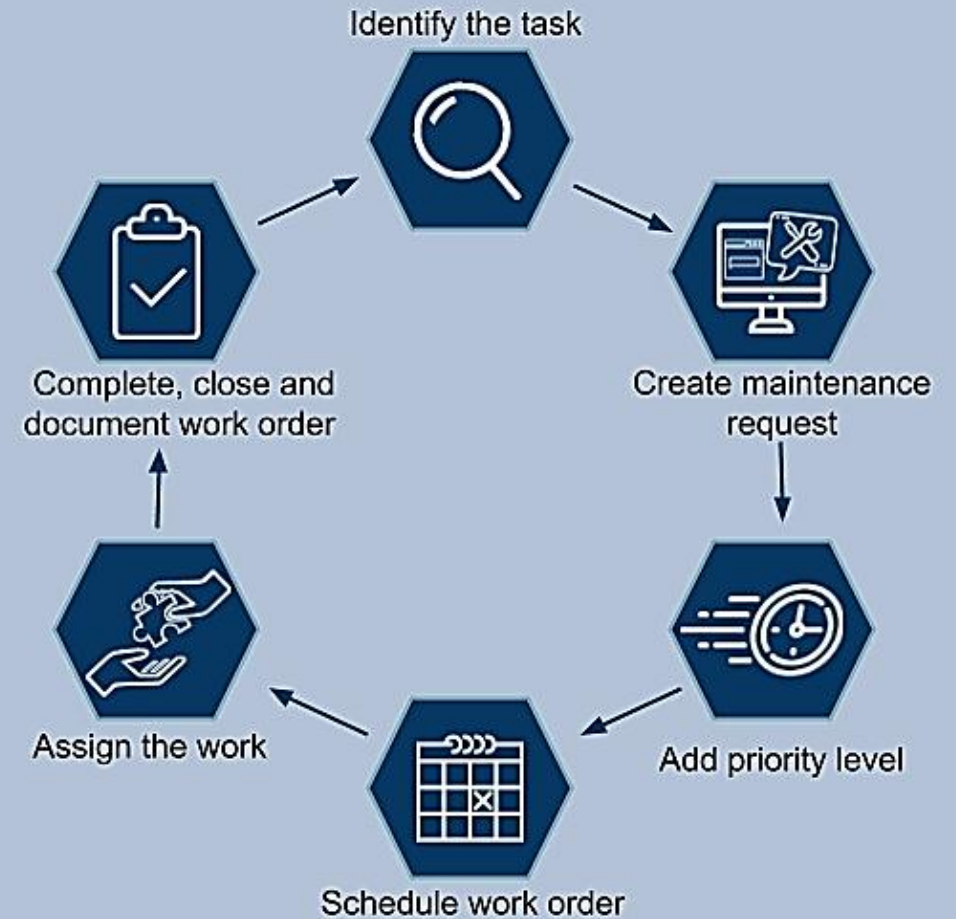
Maintenance Work Order Workflow



Maintenance Work Order Workflow

Identify the task

Determine what the task of that job is. As for maintenance work, its tasks are divided into 2 categories:



Maintenance Work Order Workflow

Identify the task

a. Planned maintenance includes scheduling routine maintenance sessions to prevent problems with your machinery or equipment.

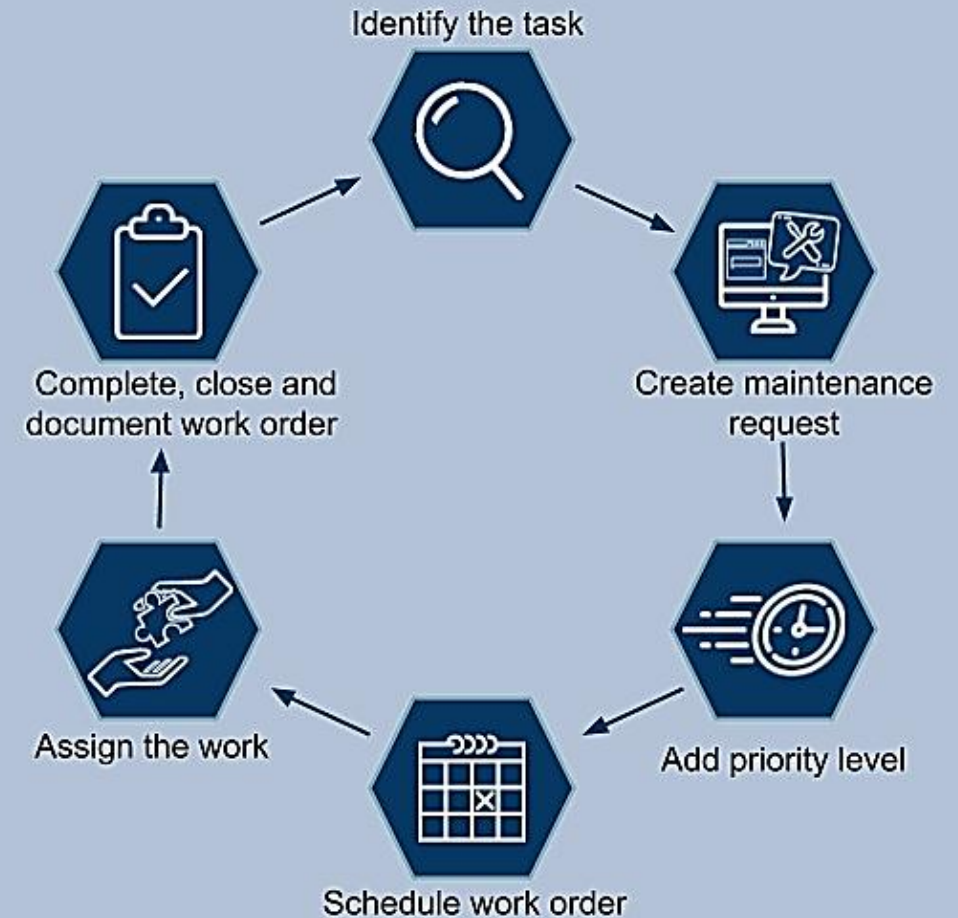
b. Unplanned maintenance you will not know in advance, which can lead to reduced life of machinery - equipment.



Maintenance Work Order Workflow

Create maintenance request

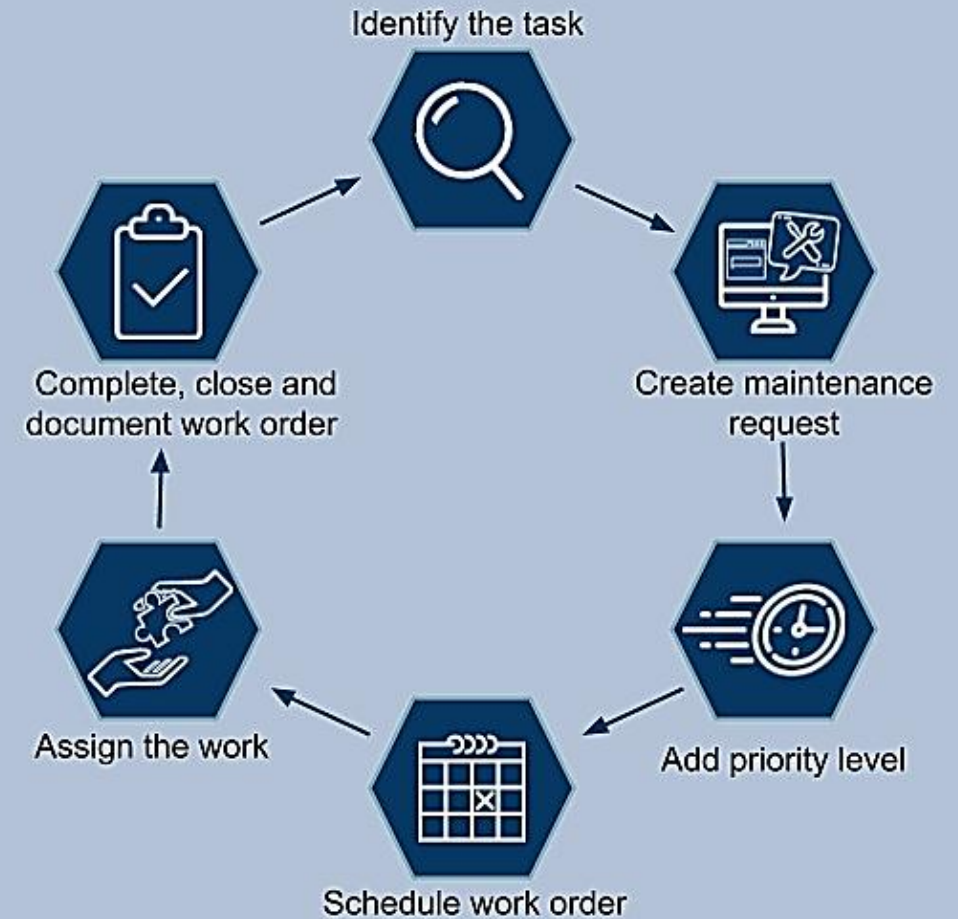
Create a maintenance request for it. The request includes all the information about the task, along with further details such as the due date.



Maintenance Work Order Workflow

Add priority level

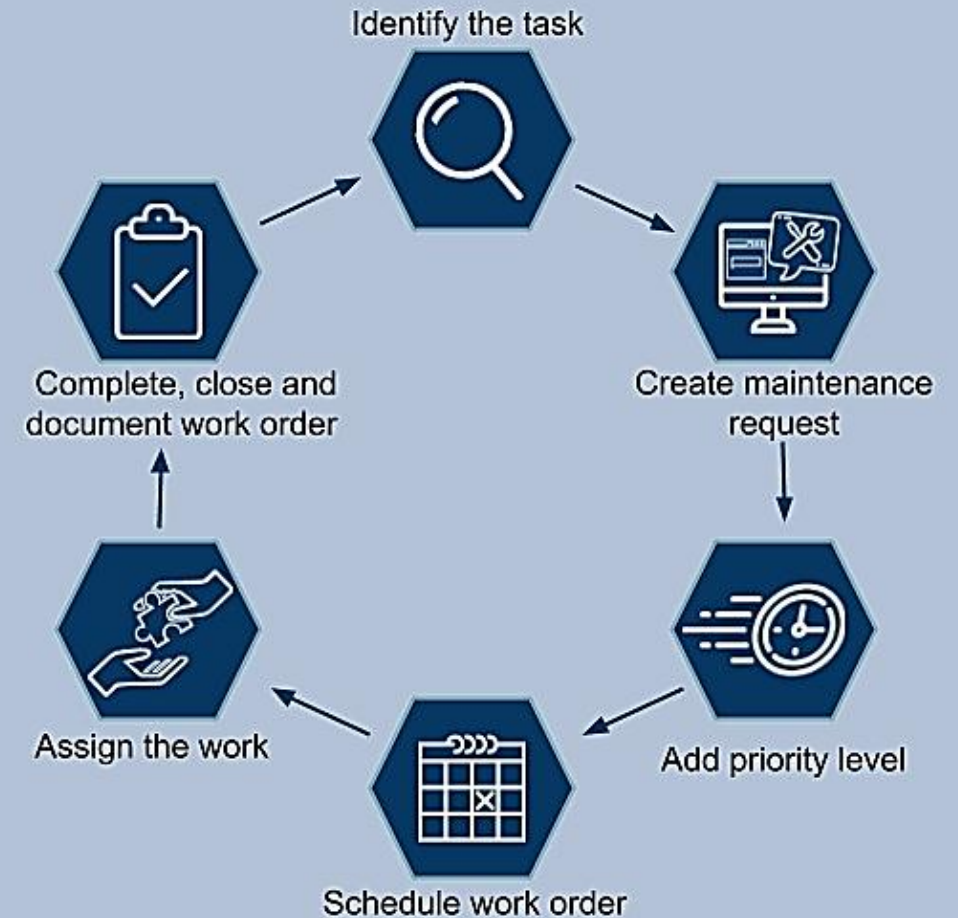
If the task is forcing a "deadline," make it a priority. Priority in maintenance work is also important, to solve problems promptly and without affecting the company.



Maintenance Work Order Workflow

Schedule work order

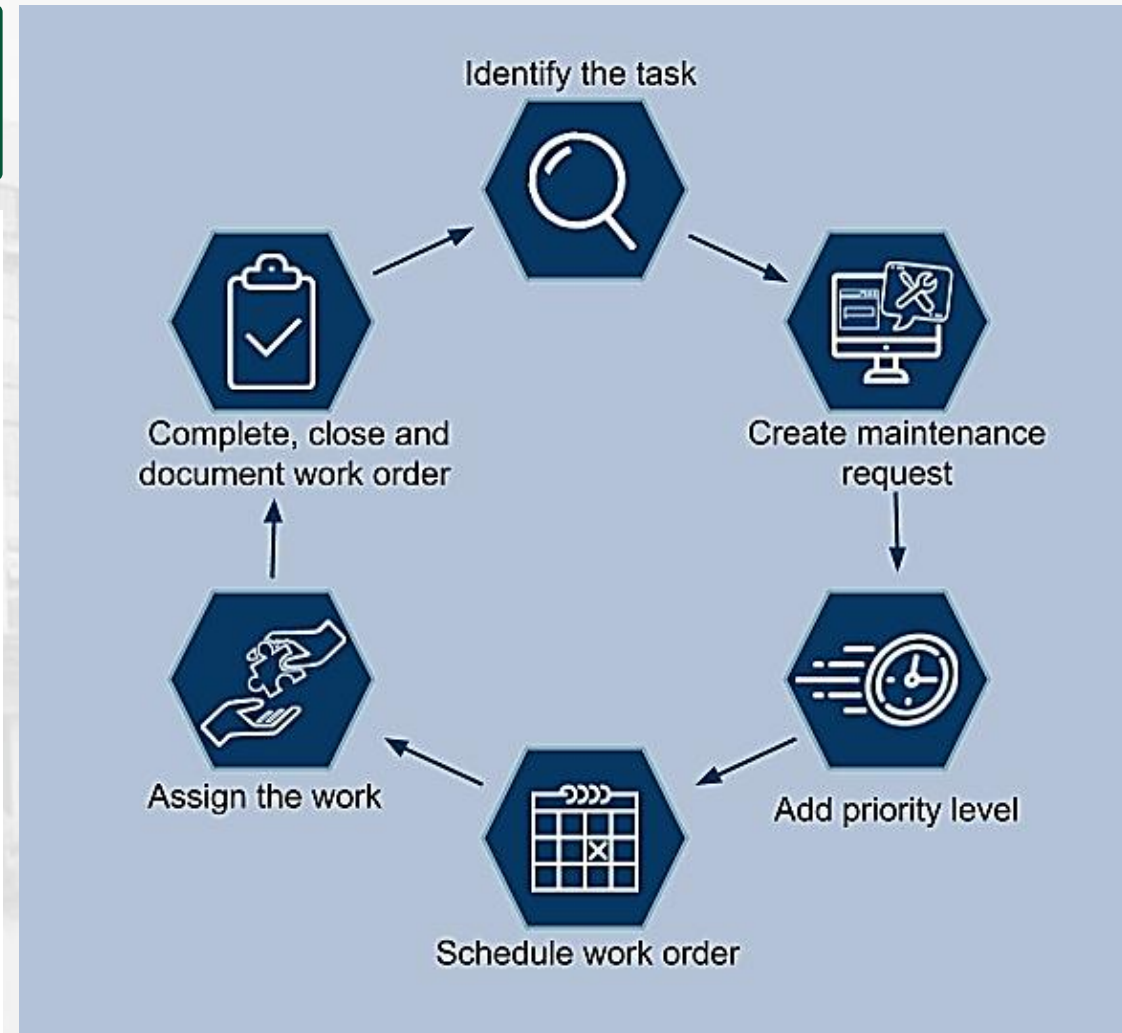
Schedule the work order based on when you want to complete it. if you have a set deadline in mind, then you can schedule the work order according to that deadline. For planned maintenance, you can schedule the task beforehand, and it will be initiated at the specified time.



Maintenance Work Order Workflow

Assign the work

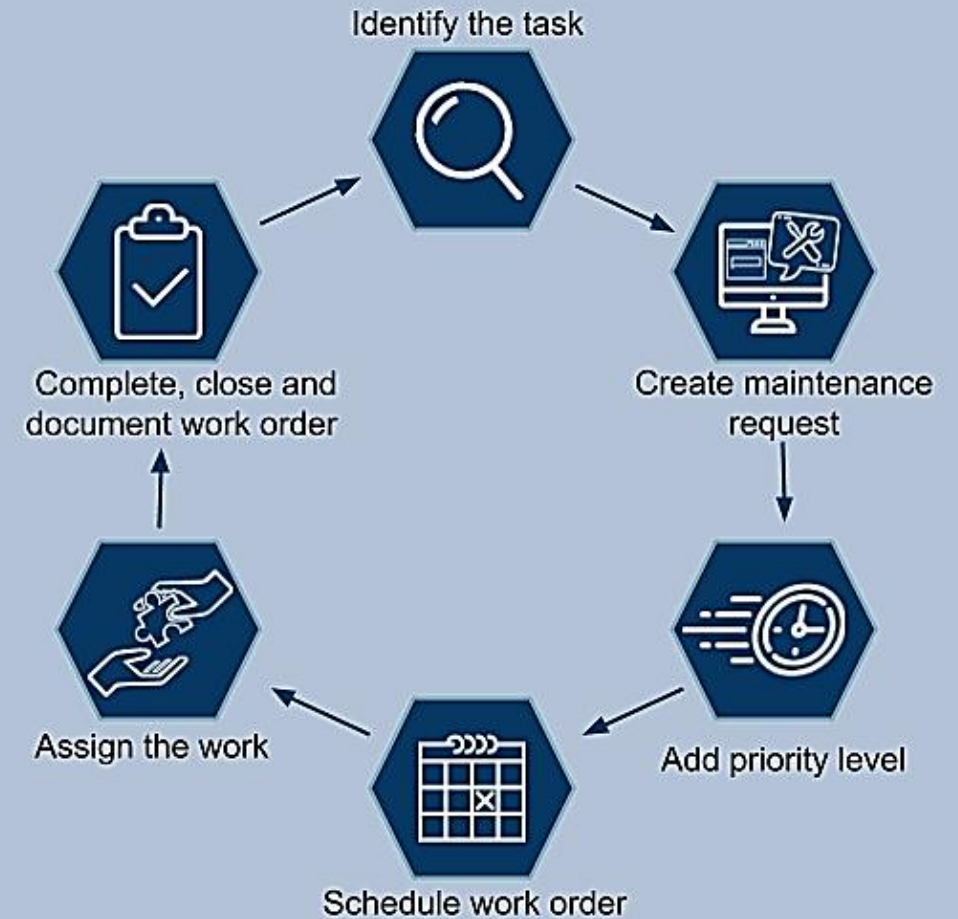
Assign it to someone. Remember that a work order cannot begin before you assign a technician to it when assigning, make sure that the technician chosen is available throughout the entire work order process and doesn't have prior commitments. If that is the case, then the technician will have to leave midway, leaving the task incomplete.



Maintenance Work Order Workflow

Complete, close and document

This is where all the information in a work order starts transforming into action to complete the maintenance process. once all the work is done, you can close the work order request.



Maintenance Work Order Workflow

Complete, close and document

The closing of a work order may require a manager to sign off on it after checking that everything has been done as instructed. Lastly, you should maintain a well-documented log of the work order. This shall prove useful in the future.

