

Create New...

1



Russ Thau

Thursday October 7, 2010

Installed Product Detail

Edit

Delete

Clone

Validate Address

Create Case

Create Work Order

2

Case Detail

Edit

Delete

Close Case

Clone

Create Work Order

Create RMA

3

Location Detail

Edit

Delete

Clone

Validate Address

Create Work Order

4

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1. In the left nav you can create a work order under the Create New...This option will open a blank work order screen
2. Under Installed Product you can open a work order that will populate data from this object
3. Under Case you can open a work order that will populate data from this object
4. Under Location you can open a work order that will populate data from this object

1. Create
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Work Order Detail

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Work Order Actions

[Generate Service Report](#)

[Create RMA](#)

[Post Usage To Inventory](#)

▼ Information

Case ?	Order Status ?	Appt Sched
Account ? <u>Acme</u>	Priority ?	High
Contact ? <u>Jim Halpert</u>	Customer Down ?	<input type="checkbox"/>
Component ? <u>123456789</u>	Order Type ?	Planned
Product	Billing Type ?	Contract
Scheduled Date		

1

▼ Problem Description

Problem Description ?

▼ Service Location

Street ?	2560 Mission College Blvd	Country ?	United States
City ?	Santa Clara	Zip ?	95054
State ?	CA		

2

► SLA

▼ Assignment

Service Team ?

Technician ?

3

▼ Closure

Work Performed ?

Special Instructions ?

4

1. This information will either populate from the previous object or can be manually entered
2. The SLA will carry over if you created the Work Order from the Case
3. This information will populate after the Schedule button
4. You can enter information in this area from the Close Work Order button

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▼ Information

Case ?

Order Status ? Appt Sched

Account ? [Acme](#)

Priority ? High

Contact ? [Jim Halpert](#)

Customer Down ? ☐

Component ? [123456789](#)

Order Type ? Planned

Product

Billing Type ? Contract

Scheduled Date

▼ Problem Description

Problem Description ?

▼ Service Location

Street ? 2560 Mission College Blvd

Country ? United States

City ? Santa Clara

Zip ? 95054

State ? CA

► SLA

▼ Assignment

Service Team ?

Technician ?

▼ Closure

Work Performed ?

Special Instructions ?

1. This allows you to edit or delete the fields on the screen
2. Clone allows you to copy the entire work order into a new one
3. Create Order Lines is where you will enter the details around an estimate, products serviced, request/receipt, usage/consumption.
4. Schedule is how you dispatch and assign resources (will be covered separately)
5. Close Work Order provides the final fields to collect data from the visit

2

3

4

Part Lines

<input type="checkbox"/>	Part	Use Pricebook	Estimated Qty	Unit Price	Discount %	Work Description
<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Labor Lines

<input type="checkbox"/>	Activity Type	Start Date and Time	End Date and Time	Estimated Qty	Unit Price	Discount %	Work Description
<input type="checkbox"/>	--None--	<input type="text"/> [10/7/2010 10:32 PM]	<input type="text"/> [10/7/2010 10:32 PM]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Expense Lines

<input type="checkbox"/>	Expense Type	Estimated Qty	Unit Price	Discount %	Work Description
<input type="checkbox"/>	--None--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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1. This is what the screen will look like when either the Estimate or the Usage/Consumption is selected.
2. Parts represent items listed in the Product object which can be attached to work completed or estimated.
3. Labor lines can either be Date & Time stamped or entered as a Qty.
4. Expenses can be listed in this area associated with the Work Order.



New Work Details

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Work Details Edit

Save

Save & New

Cancel

Information

Record Type Products Serviced

Work Order ?

2

Serial Number

3

Work Description ?

Save

Save & New

Cancel

1. After you select Products Serviced you will get the screen above.
2. In this area you can enter the Work Order associated or this can be automatically entered for you.
3. The Serial Number field is used to enter multiple items you might be servicing on this visit. When associated with a Preventative Maintenance visit you can automatically populate this with multiple items.

Create Request/Receipt lines for Work
Order: WO-00000005

Add Line

Delete Lines

Save

Cancel

Create Request/Receipt lines Help ?

<input type="checkbox"/>	Part	Requested Qty	Date Required	From Location	To Location
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> [10/7/2010]	<input type="text"/>	<input type="text"/>

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1. This is the screen that appears after the Request/Receipt is selected.
2. Part can be associated with any item in your Products object.
3. The location fields can represent inventory locations ranging from a customer, warehouse, or truck stock.
4. After you save this screen it can generate a notification to the correct individual who can either locate or order the requested part.

Work Order 005

2

WO-00000005

Status

Santa Clara, 123456789, Appt Sched, Planned, CA, 95054

Filter By

Work Order Number	Account	Contact	Case	Priority	Order Status	Order Type	Dispatch Status	City	State	Component	Customer Down Status
WO-00000005	Acme	Jim Halpert		High	Appt Sched	Planned	New	Santa Clara	CA	123456789	No

Technicians

Service Team View

Member Name	Thu Oct 07, 10		Fri Oct 08, 10		Sat Oct 09, 10		Sun Oct 10, 10		Mon Oct 11, 10		Tue Oct 12, 10		Wed Oct 13, 10	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
▼ Equipment														
▼ Resource 1														
▼ Sample Service Team														
▼ Sample Technician														



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1. This screen will appear by hitting the Schedule button.
2. To access help for the dispatch console hover near the top of the screen and it will appear.

Close Work Order WO-00000005

Close Work Order

Cancel

Close Work Order Help ?

Work Performed ?		Special Instructions ?	
Customer Failure Feedback ?		Corrective Action ?	
Configuration – Before ?		Configuration – After ?	
Failure Location ?	--None--	Symptom ?	--None--
Failed Assembly ?	--None--	Root Cause ?	--None--
Order Status ?	Closed	How Fixed ?	--None--

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- 1. This screen will appear after hitting the Close Work Order button.
- 2. Information on this screen can be entered as free form text or pick lists.

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Product

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▼ Closure

Work Performed ?

Special Instructions ?

1. The Generate Service Report allows you to create a PDF from the fields entered into the Work Order screen.
2. Create RMA initiates a new screen so you can start the process surrounding an RMA.
3. Post Usage To Inventory is used when inventory has been listed in the Usage/Consumption lines and needs to be deducted.