

How to Assign Technicians to Work Orders

To assign technicians to the estimate's Work Order, you must first enter your technicians into the system. On the left sidebar select the **“Settings”** button. Then select the **“Technicians”** tab.

The screenshot shows the web application interface. On the left is a sidebar with buttons: New Estimate, Open Estimate, Frame Data, Parts Search, Reports, Support, Rates, Vendors, **Settings** (highlighted with a yellow box), and Logout. The main content area has a top navigation bar with tabs: Estimators, Change Password, Account Preferences, Company Profile, Billing, **Technicians** (highlighted with a red box), and User Accounts. Below the tabs are input fields for First Name, Last Name, and a Labor Type dropdown menu set to 'All'. At the bottom are 'Save' and 'New' buttons. A yellow arrow points from the 'Settings' button in the sidebar to the 'Technicians' tab.

The Technician's page is where you will enter in your technicians and designate what type of labor they will perform. In the fields enter the First & Last name and select a Labor Type from the dropdown menu. The labor type selected will determine what labor category they can be assigned to on the Work Order. If you wish to be able to assign a tech to any category on the Work Order, choose **“All”** for the labor type. Then select the **“Save”** button. You can edit or delete existing technicians in this section.

The screenshot shows the 'Technicians' page. It has the same top navigation bar as the previous screenshot. Below the tabs are input fields for First Name, Last Name, and a Labor Type dropdown menu set to 'All'. At the bottom are 'Save' and 'New' buttons. To the right of the form is a table of existing technicians. A yellow arrow points from the 'Save' button to the table. Another yellow arrow points from the 'Technicians' tab to the table. The table has columns: First Name, Last Name, Labor Type, Edit, and Delete. It contains three rows of data. At the bottom of the table is a pagination bar showing '1 - 3 of 3 items'.

First Name	Last Name	Labor Type	Edit	Delete
Mike	Body	Body	Edit	Delete
Fred	Painter	Refinish	Edit	Delete
Joe	Everything	All	Edit	Delete

To assign Technicians to the Work Order, open the estimate and navigate to the Print page. Here you will select “Work Order”. If you are not assigning technicians, simply select the “Generate” button.

2018 Ford -Mustang GT | \$3,264.69 [Messages](#) [Updates](#)

[Repair Notes](#) [Payment Info](#) [Print](#) [Send Estimate](#) [Edit Rate Profile](#) [Close Estimate](#)

Print Estimate

Generate Report

Estimate

Authorization Letter

Customer Letter

Dealer Letter

Direction of Payment Letter

EMS

Estimate Approval

Final Report

Follow Up Letter

Parts Order

Thank You Letter

Work Order Report

Custom Reports

Select	Labor Type	Technician
<input type="checkbox"/>	All	Select
<input type="checkbox"/>	Body	Select
<input type="checkbox"/>	Frame	Select
<input type="checkbox"/>	Structure	Select
<input type="checkbox"/>	Mechanical	Select
<input type="checkbox"/>	Electrical	Select
<input type="checkbox"/>	Glass	Select
<input type="checkbox"/>	Detail	Select
<input type="checkbox"/>	Cleanup	Select
<input type="checkbox"/>	Other	Select
<input type="checkbox"/>	Refinish	Select

1 - 11 of 11 items

☐ Hide Customer Data

☒ Print Parts & Labor Notes

☒ Print Inspection Date

☐ Print Labor Hours

Generate

If you wish to generate a work order for only a specific labor type (or all), select that labor type and assign the appropriate technician(s). In this example, we are creating a work order for the refinish portion only. Then select the Generate button.

Generate Report

Estimate

Authorization Letter

Customer Letter

Dealer Letter

Direction of Payment Letter

EMS

Estimate Approval

Final Report

Follow Up Letter

Parts Order

Thank You Letter

Work Order Report

Custom Reports

Select	Labor Type	Technician
<input type="checkbox"/>	All	Select
<input type="checkbox"/>	Body	Select
<input type="checkbox"/>	Frame	Select
<input type="checkbox"/>	Structure	Select
<input type="checkbox"/>	Mechanical	Select
<input type="checkbox"/>	Electrical	Select
<input type="checkbox"/>	Glass	Select
<input type="checkbox"/>	Detail	Select
<input type="checkbox"/>	Cleanup	Select
<input type="checkbox"/>	Other	Select
<input checked="" type="checkbox"/>	Refinish	Fred Painter

1 - 11 of 11 items

☐ Hide Customer Data

☒ Print Parts & Labor Notes

☒ Print Inspection Date

☒ Print Labor Hours

Generate