Fleet Maintenance Management Software

CUSTOMER GUIDE: Work Orders

Overview

FLEETMATE will enable you to record all maintenance and/or repair activities performed on a vehicle via a Work Order. Work orders can accommodate any number of individual **Labor/Task** lines, and any number of replacement **Parts** lines. You can also associate one or more external documents or scanned images to a work order via **Attachment** records.

You can number your work orders based on your own numbering scheme, or you can tell FLEETMATE to sequentially number your work orders. Use the **Company Data** | **Company Information...** dialog to control whether automatic work order numbering is on or off. If automatic work order numbering is off, you will be prompted for a work order number. You must enter a work order number to continue. Work order number must be unique.

Work Orders should be used for unscheduled repairs as well as scheduled preventive maintenance. You can also use a work order for inspection type activities, particularly if you want a record of the work performed.

A **Description** field is designed to contain a brief summary of the work performed on a work order. As an example, a summary description can be something like “30000 Mile Maintenance”, or “Scheduled PM”. Keep your entry brief. One to three words is a good rule to follow. Use the **Full Description** field to elaborate further.

The **Description** field of each **Labor Line** entered on a work order is used by the system to determine when a specific type of work was performed. When completing Reminders, the description field on the Labor Line must match the reminder description. This enables the system to recognize that the work was previously performed, and enables the system to setup new reminders when needed. When editing work orders, be careful **NOT** to change the **Description** field on Labor/Task lines that relate to your reminders.

Work Orders have a **Status** flag, indicating whether the work order is pending, or completed. The work order also features **Creation Date** and **Completion Date** fields. These fields are particularly useful if you want to issue work orders to your shop and complete the work orders once the service is completed. This serves as a tracking mechanism so that you can know what work is still pending. You can also create and complete a work order in one step if that is the better approach for your organization. If you supply a **Completion Date** during the **Add** operation, the **Completed** checkbox will automatically be checked.

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Entering a Work Order

A maintenance log is maintained for each vehicle in your fleet. The first step in this process is to select the necessary vehicle. Click a vehicle record in the vehicle pane of the main window to select a vehicle.

Existing work orders (i.e. maintenance records) will be listed under the Maintenance/Work Orders topic tab in the lower section of the main window. If a different topic tab is currently active (**bold**), click the **Maintenance/Work Orders** topic tab.

Right-click in the Maintenance/Work Orders list area, and then choose **Add Work Order…** from the popup menu. A new Work Order window will appear.

Click the **Calendar** button to set the date field to reflect the date the work order was **Created**, or simply use today's date, and then press the [**Tab**] key. If you are using Automatic Work Order Numbering, the next work order number will appear. Press [**Tab**]. Otherwise, enter your own work order number and then press [**Tab**]. A unique work order number **must always** be present on a work order.

Enter the **Odometer** (or Clock) value and press [**Tab**].

If you are completing this work order, click the **Calendar** button to select the **Completion Date** or enter the date and press [**Tab**].

Select the **Driver** from the droplist and press [**Tab**].

Enter values into the **Serviced By** and **Account** fields, or select these values from the droplists, then press [**Tab**].

The **Description** field is designed to hold a brief summary of the work performed on this work order. As an example, a summary description might read "Scheduled PM", or "Will Not Start".

The **Full Description** field is a free-form field for you to use to elaborate on the work that is needed and/or the work that was performed.

The Status Flags area is used to indicate **Warranty** and/or **Recall** work, and to indicate whether or not this work order is **Completed**. The **Warranty** flag will be checked as a default if the vehicle is currently considered in warranty, based on dates supplied on the vehicle Details window.

This completes the basic work order. You may now add **Parts**, **Labor** and/or **Attachment** information to this work order, or simply click **OK** to save the work order as-is. Note that whenever you **Add** a work order, the work order is <u>always</u> issued, regardless of whether or not you click **Cancel** after the add. If you mistakenly add a work order, you will need to delete it manually to remove it from your database. If you are using the automatic work order numbering in FLEETMATE, the work order number will be used and will no longer be available.

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Editing a Work Order

A work order log is maintained for each vehicle in your fleet. The first step in this process is to select the necessary vehicle. Click a vehicle record in the vehicle pane of the main window to select a vehicle.

Existing work orders will be listed under the Maintenance/Work Orders topic tab in the lower section of the main window. If a different topic tab is currently active (**bold**), click the **Maintenance/Work Orders** topic tab.

Double-click on the Work Order record you need to edit. The existing Work Order record will appear.

You may now edit the Work Order as needed. Once you have completed your edits, click **OK** to save your changes, or click **Cancel** to discard your changes.

Note, if you add or edit Labor or Parts entries on a work order, **always** click **OK** so that the work order totals will be updated accordingly.

Deleting a Work Order

Click a vehicle record in the upper pane of the main window to select a vehicle that contains the work order record you need to delete.

Existing work orders (i.e. maintenance records) will be listed under the Maintenance/Work Orders topic tab in the lower pane of the main window. If a different topic tab is currently active (**bold**), click the **Maintenance/Work Orders** topic tab.

Right-click on the Work Order record you need to delete, and then choose **Delete Work Order** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

When you delete a work order, all parts and/or labor records associated with the work order will be deleted as well. If parts were issued from inventory on the work order, those parts will be credited back to inventory using inventory credit transactions. You'll see these credit transactions appear in your inventory transaction journal.

Adding Labor/Task Entries to a Work Order

Existing labor entries for the current work order will be listed under the **Labor** topic tab in the lower-left area of the Work Order window. If a different topic tab is currently active (**bold**), click the **Labor** topic tab. A **Labor** record enables you to record the **task** that was performed, the **time** involved, and the **charge**.

Right-click in the Labor list area, and then choose **Add New Task...** from the popup menu. A new Task record will appear.

The **Performed By** setting indicates whether this task was performed by an employee, or by a vendor. In either case, you will need to select an employee or a vendor from the droplist, to indicate who performed this work.

Enter the Number of **Labor Units** for this task and press [**Tab**]. Recall that a labor Unit represents one (1) hour, or any fractional portion of an hour. How you use this field depends upon how you bill for your shop labor.

The **Cost/Unit** field will contain the price you have defined for one unit of labor. This is your default. If you have defined different labor rates each technician in your Personnel module, the default rate for that employee (or vendor) all appear. You may edit this field if necessary. Press [**Tab**].

The **Task Total Cost** will contain the number of **Units** entered multiplied by your **Cost/Unit** value.

Enter a **Task Description** or select a value from the droplist and press [**Tab**]. If you are entering this Labor/Task line in relation to a reminder that you are completing, do NOT change the Description field. If you want to add a labor line for a reminder that is currently pending, to indicate that the work is being done in advance, make sure that the Task Description text is an exact match of the Reminder Description text. The text of the **Task Description** field must be an exact match of the **Reminder Description**, so that FLEETMATE can tell that the work was performed.

Check the **In-Warranty** box if this task was performed under warranty. If you check the **In-Warranty** box, the labor pricing information will be saved, but the labor cost will <u>not</u> be added to the work order total. If the vehicle is considered as in-warranty, based on warranty expiration dates you have entered on the vehicle record, the system will automatically check the **In- Warranty** box as a default.

Click **OK** to add this Labor entry to the current work order, or click **Cancel** to discard your entries.

More Information
If the **Task Description** contains the text “**rotate tires**” or “**tire rotation**” during an **Add**, and you are using the Tire Management features in FLEETMATE, you will automatically be given an opportunity to specify the rotation information (i.e. Axle/Wheel positions) on a **Tire Rotation** dialog.

Editing a Labor/Task Entry

Double-click on the Labor entry that you need to edit. The existing Labor record will appear.

You may now edit the Labor record as needed. Once you have completed your edits, click **OK** to save your changes, or click **Cancel** to discard your changes.

If you are editing this Labor line in relation to a reminder that you are completing, do NOT change the Description field. The text of the **Description** field must be an exact match of the **Reminder Description**.

Note: if you add or edit Labor or Parts entries on a work order, **always** click **OK** so that the work order totals will be updated accordingly.

Deleting a Labor/Task Record

Right-click on the Labor entry you need to delete, and then choose **Delete Selected Labor Line** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

More Information
If you add or edit Labor or Parts entries on a work order, **always** click **OK** so that the work order totals will be updated accordingly.

If the Labor line being deleted was for a tire rotation, and that tire is under the control of **Tire Management**, the deletion will NOT automatically back-out the prior rotation. You will need to use the Tire Management window to manually adjust Axle/Wheel positioning if necessary.

Adding Parts to a Work Order

Existing parts records for the current work order will be listed under the **Parts** topic tab in the lower-left area of the Work Order window. If a different topic tab is currently active (**bold**), click the **Parts** topic tab.

Right-click in the Parts list area, and then choose **Add New Parts Record…** from the popup menu. A new Parts record will appear.

Enter the **Quantity** for this part. If you are issuing the material from Inventory, click the **Inventory** box. The **Part No** field label will appear for **non-inventory** parts. For inventory items, the Part No field label will change to **Stock No**, indicating that an inventory stock number is expected. If you already know the Stock No that you need, you may enter the Stock Number and press [**Enter**]. You can also use this lookup feature using the manufacturer's part number entered on the inventory record. FLEETMATE will retrieve your parts information for you from Inventory.

Important Information
If you add a quantity of two (2) or more of a Part from Inventory, and the part cost is being based on Avg Cost, FIFO, or LIFO, FLEETMATE will break the parts out into individual line items, each with a quantity of one (1). It does this so that the material cost is calculated correctly for each part issued. If you manually manage your cost, one line item will appear for a quantity of two (2) or more.

If the part added was a tire from **Tire Management**, you will need to mount the tire, and specify the tire's mounting location.

If you are using the material **Cross-Reference** feature for your inventory items, you may also enter the manufacturer's part number and press [**Enter**]. FLEETMATE will automatically cross-reference your manufacturer's part number to the equivalent inventory Stock No and will retrieve your part information for you from Inventory. If there are two or more possible matches for a part no that you have entered, you will be given a pick list from which to choose the correct part.

This field also offers an **Extended List** button. Clicking this button will produce a **Pick List** dialog that will enable you to choose a part from **Inventory**, to select a **Previously Used Part**, or to select a tire from **Tire Management.** When selecting a part using the **Inventory** tab, you will first need to select the **Inventory Type** from the droplist. This feature will list only material that relates to the selected Inventory Type, and makes the selection process easier since you've narrowed down the type of part you are searching for. You can also further narrow the parts listed by checking the box labeled **List Inventory Items Previously Used on This Vehicle Only**. Uncheck the box to once again list all available inventory items for the current Inventory Type.

Once you locate the part you are looking for, double-click on it. This will close the Pick List window and will place the available data onto the Parts window. If you selected an inventory item, the stock number, selling price and description will be automatically supplied. If you selected a previously used part, the part number, last purchase price and description will be supplied. You will want to check the price from the previously used part selection to be certain that it is valid.

Check the **In-Warranty** box if the replacement part(s) is/are covered under warranty, and select an **Account** for this replacement part. If you check the **In-Warranty** box, the part pricing information will be saved, but the parts subtotal for this line item will not be added to the work order total. If the vehicle is considered as in-warranty, based on warranty expiration dates you have entered on the vehicle record, the system will automatically check the **In-Warranty** box as a default.

Click **OK** to add this parts record to the current work order, or click **Cancel** to discard your entries.

As you add parts records, FLEETMATE will check for a prior replacement of the same **Part No** value within the past '**x**' days, where '**x**' is a value that you specify on the **Customer Data** | **Customer Information...** dialog.

This check is made only once when you [**Tab**] out of the **Part No** field during an **Add** operation. If a prior instance was found where the same **Part No** was used on the current vehicle within the past '**x**' number of days, a notation will be written to the **Notes** field, and the **In Warranty** box will be automatically checked. You may adjust these values if necessary, before saving your parts record. You may also exclude stock/part numbers for frequently used parts, (e.g. motor oil, filters, etc.) so that these common parts do not trigger the notation or the In Warranty status. These stock number exclusions can be made using the **Company Data** | **Company Information...** dialog.

If you change the **Part No** field as you are adding a new parts record, this check is not repeated.

This check is not made during edits to parts records.

Important Information

If you add a quantity of two (2) or more of a Part from Inventory, and the part cost is being based on Avg Cost, FIFO, or LIFO, FLEETMATE will break the parts out into individual line items, each with a quantity of one (1). It does this so that the material cost is calculated correctly for each part issued.

If you manually manage your cost for the inventory item, one line item will appear for a quantity of two (2) or more, since the cost does not vary and is based on your value.

When FLEETMATE breaks parts out into individual line items as described above, use care **NOT** to edit the quantity to a value other than one (1). Otherwise, your Avg Cost, FIFO, or LIFO cost values will not be recorded correctly. If necessary, delete the relevant parts line, and add it back as if initially adding the part.

If the part added was a tire from **Tire Management**, you will need to mount the tire, and specify the Axle/Wheel position where the tire was mounted. You will receive a **Select Tire Position and Record Labor** dialog to enable you to do this. This dialog will also automatically create appropriate labor lines on your work order to cover the tire related activities, and will automatically dismount the existing tire.

Adding Parts to a Work Order via a Barcode Scan

If you are using barcodes to manage your parts inventory, you can also simply scan the barcode for a part to add it to your work order. The barcode that you scan must represent an item that currently exists in your inventory. If a stock item is not found, a standard Parts window will appear. You will then need to complete the Parts window as you normally would.

Click the **Scan Parts** tab. Position your flashing cursor in the **blue** text box, and scan your part. As a scan is accepted, you will see the item appear in a list on the **Scan Parts** tab. This is a temporary list of items that you have scanned thus far. The part will also be added to the **Parts** tab, indicating that the part was actually added to your work order.

You may also manually enter the Stock Number in the **blue** text box and press [**Enter**]. FLEETMATE will then retrieve your parts information for you as if the item was scanned.

If you are using the material **Cross-Reference** feature for your inventory items, you may also scan the barcode that represents the manufacturer's part number. FLEETMATE will automatically cross-reference your manufacturer's part number to the equivalent inventory Stock No and apply the inventory item to your work order. If there are two or more possible matches for a part no that you have entered or scanned, you will be given a pick list from which to choose the correct part.

Editing a Parts Record

Double-click on the Parts record you need to edit. The existing Parts record will appear.

You may now edit the Parts record as needed. Once you have completed your edits, click **OK** to save your changes, or click **Cancel** to discard your changes.

If you change from non-inventory to inventory, or vice versa, or if you change the quantity for an inventory part, your stock On Hand will be updated accordingly. You will see these transactions appear in your inventory journal for the related inventory items.

Note, if you add or edit Labor or Parts entries on a work order, **always** click **OK** so that the work order totals will be updated accordingly.

Deleting a Parts Record

Right-click on the Parts record you need to delete, and then choose **Delete Selected Parts Record** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

If you delete a parts record that was used to issue parts from inventory, your inventory will be credited based on the original quantity issued. You will see a “credit” transaction appear in your inventory journal for the related inventory item.

More Information
If you add or edit Labor or Parts entries on a work order, **always** click **OK** so that the work order totals will be updated accordingly.

If the part being deleted was a tire that was originally issued from **Tire Management**, it will NOT be automatically dismounted from the vehicle. You will need to use the Tire Management window to manually dismount the tire.

Adding an Attachment Record to a Work Order

Existing **Attachment** records for the current work order will be listed under the **Attachment** topic tab in the lower-left area of the Work Order window. If a different topic tab is currently active (**bold**), click the **Attachment** topic tab.

Right-click in the Attachment list area, and then choose **Add New Attachment/Image Record...** from the popup menu. A new Attachment record will appear.

This window enables you to relate a file on your disk to this work order. Provide a **Description** for the attachment, and then click the **Browse** button to navigate to and select the file that you want to attach to this work order.

Select the **View Mode** for this attachment. The **Display Image** mode can be used for **BMP**, **JPG**, and **GIF** type image files. This mode will use the internal FLEETMATE image viewer to display your image. The image should fit within your screen with only minimal scrolling needed. The **Launch Application** mode is used to display very large image files (larger than 16000h x 16000w), or to display other types of content such as HTML pages, Adobe® PDF files, Microsoft® Excel spreadsheets, or Microsoft® Word documents.

Click **OK** to save your Attachment record, or click **Cancel** to discard your entries.

To view an image, right-click on the Attachment record and choose **View Image...** from the popup menu.

Editing an Attachment Record

Double-click on the Attachment record you need to edit. The existing record will appear.

You may now edit the Attachment record as needed. Once you have completed your edits, click **OK** to save your changes, or click **Cancel** to discard your changes.

Deleting an Attachment Record

Right-click on the Attachment record you need to delete, and then choose **Delete Selected Attachment/Image Record** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

Note that deleting an Attachment record does not delete the actual image file. It only removes the attachment record, which is a reference to the physical file.