
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 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.

Work Order Features

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. Each work order number must be unique.

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

The Serviced By field represents the organization, department, or shop team responsible for this work order. It does not specifically represent a fleet technician or a vendor.

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

The Category field is used to further categorize your work orders. As an example, you may want to establish a Fuel Economy Awareness campaign at your company. Any vehicle brought in for service in connection with potential poor fuel economy can be categorized as "Fuel Economy Awareness" so that you can review the activity and related costs of your campaign.

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Work Order Features

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 later, 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 a better approach for your organization. If you supply a Completion Date during the Add operation, the Complete checkbox will be automatically checked. There is also a feature in FLEETMATE that will automatically complete a work order as the work order is created. Whether you use of this feature will be determined by your business process requirements.

Edit Existing Work Order - Tag No: K616755 Veh No: 545-5 2004 Ford E-250

Creation Date: 03/31/2006 Priority: 1 Order No: FM-1000157 Odometer: 42301
 Completion Date: 03/31/2006 Driver: E00003
 Serviced By: Fleet Maintenance Department Acct: 10000 - Fleet Maintenance
 Description: Scheduled PM Category: Routine
 Full Description: Routine preventive maintenance activities. Lower radiator hose shows signs of cracking. Replace same and perform cooling system flush.

Labor [F6]

Units	Cost/Unit	Description
3.00	17.00	Check/Replace Brake Pads/Shoes
2.00	17.50	LOF
2.00	17.50	Rotate Tires
2.00	10.00	Replace Lower Radiator Hose
2.00	17.50	Cooling System Flush

Order Status
 Warranty Recall Complete

Charges / Billing

Labor Subtotal:	176.00
Misc/Shop Supplies:	20.00
Parts SubTotal:	85.42
Discount:	0.00
5.000 % Tax:	4.27
Total:	285.69

Created: 03/31/2006 9:30:32 PM by: Unknown Last Edit: 04/05/2014 11:52:08 PM by: admin

E-Mail Invoice Print Invoice E-Mail Order Print Order OK Cancel

Work Order Window

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Entering a Work Order

A collection of work orders 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 Work Orders topic tab in the Activity pane of the main window. If a different topic tab is currently active, click the Work Orders topic tab.

Right-click in the 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 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 in sequence will appear. 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 Hours) value at the time of service and press [Tab].

If you are completing this work order, click the Calendar button to set the Completion 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 Serviced By field represents the organization, department, or shop team responsible for this work order. It does not specifically represent a fleet technician or a vendor.

The Description field is designed to hold a brief summary of the nature of the work order. Examples would be "Scheduled PM", or "Unscheduled Repair". The Full Description field is a free-form field for you to use to elaborate on the work that is needed and/or the symptom that was reported. The Category field is used to further categorize your work orders.

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 warranty expiration dates defined on the Vehicle Details window.

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Entering a Work Order

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. You can add labor and parts information at a later time

You can print the work order as-is, or email the work order at any time.

i Note that whenever you Add a work order, the work order is always added to your database, 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. Or leave it in-place and use it at a later time.

If you are using the automatic work order numbering feature in FLEETMATE, the next work order number in sequence will be used during each add function. That work order number will no longer be available.

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Editing a Work Order

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

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. There is no undo function available.

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 previously issued from inventory on the work order, those parts will be automatically credited back to inventory using inventory credit transactions. You'll see these credit transactions appear in your inventory transaction journal.

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Adding A Labor Line to a Work Order

Existing labor lines 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, click the Labor topic tab to select it. A Labor record enables you to record each service activity that was performed within the context of the current work order, the technician (or vendor) time spent (in Billable Units), and the labor charge for that labor line.

Right-click in the Labor list area, and then choose Add New Labor Line... from the popup menu. A new Labor Line record will appear similar to the picture below.

Work Date: 03/23/2014

Performed by: Employee Vendor

Billable Units: 4 Cost/Unit: 10.00 Labor Total: 40.00 In-Warranty:

Actual Units: Description: Replace Lower Radiator Hose

Notes: Found excessive dry cracking

Created: 10/20/2014 7:02:46 AM by: Unknown Last Edit: 10/20/2014 7:02:46 AM by: Unknown

OK Cancel

Labor Line Window

The **Performed By** setting indicates *who* performed this service activity, an employee, or 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 **Billable Units** for this activity and press [Tab]. Recall that a labor Unit represents the smallest amount of time that you account for. How you use this field depends upon how you bill for your shop labor. Refer to the Customer Guide entitled "Setup" for additional information.

If you have defined different labor rates for each technician using the Personnel module, the default rate for that employee (or vendor) will appear. You may edit this field if necessary.

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As a default, as you enter the number of Billable Units, the **Actual Units** field will inherit the same number. The Billable Units determine the billing total for the current labor line. This may represent a *Flat Rate* for this specific type of work. However, if the technician (or vendor) spent more or less time performing this work, and you want to record this fact, enter the **Actual Units** spent performing the work. This will not affect billing the total for the labor line. However, both values will be stored in your database for reporting purposes. This will let you generate technician productivity statistics, including the percentage of Actual Units vs. Billable Units.

The Total for the labor line will equal the number of Billable Units multiplied by the Cost/Unit value.

Enter a Description or select a value from the droplist and press [Tab]. If you are entering this Labor 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 labor Description text is an exact match of the reminder Description text. Use the Description droplist to pick the text description. The text of the labor line 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 labor activity was performed under warranty. If you check the In-Warranty box, the labor pricing information will be saved, but the labor cost 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. Uncheck the In-Warranty box if necessary.

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



More Information

If the labor Description contains the phrase “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.

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Editing a Labor Line

Double-click on the Labor Line 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, click OK to ensure that the work order totals will be updated accordingly.

Deleting a Labor Line

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. There is no undo feature available.

i More Information

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.

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Adding A Parts Line 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, 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 used for this part. The Part No field caption will appear for non-stock parts. Enter the part number.

If you are issuing the material from Inventory, check the Inventory box. For inventory items, the Part No field caption 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. If more than one (1) match is found, a Pick List window will appear.

Edit Existing Part - Tag No: K616755 Veh No: 545-5 2004 Ford E-250

Replacement Date: 03/31/2006

Qty: 1 Inventory

Selling Price Ea: 48.55

Part No: 66471

Vendor: Auto Pros

Add Tax Pre-Tax Price: 48.55 Plus: 7.000 Percent

Description: Lower Radiator Hose

Warranty: 0 Days (Zero if No Warranty) In-Warranty

Account No: 10000 - Fleet Maintenance

Notes:

Created: 04/05/2014 11:49:12 PM by: admin Last Edit: 04/05/2014 11:49:12 PM by: admin

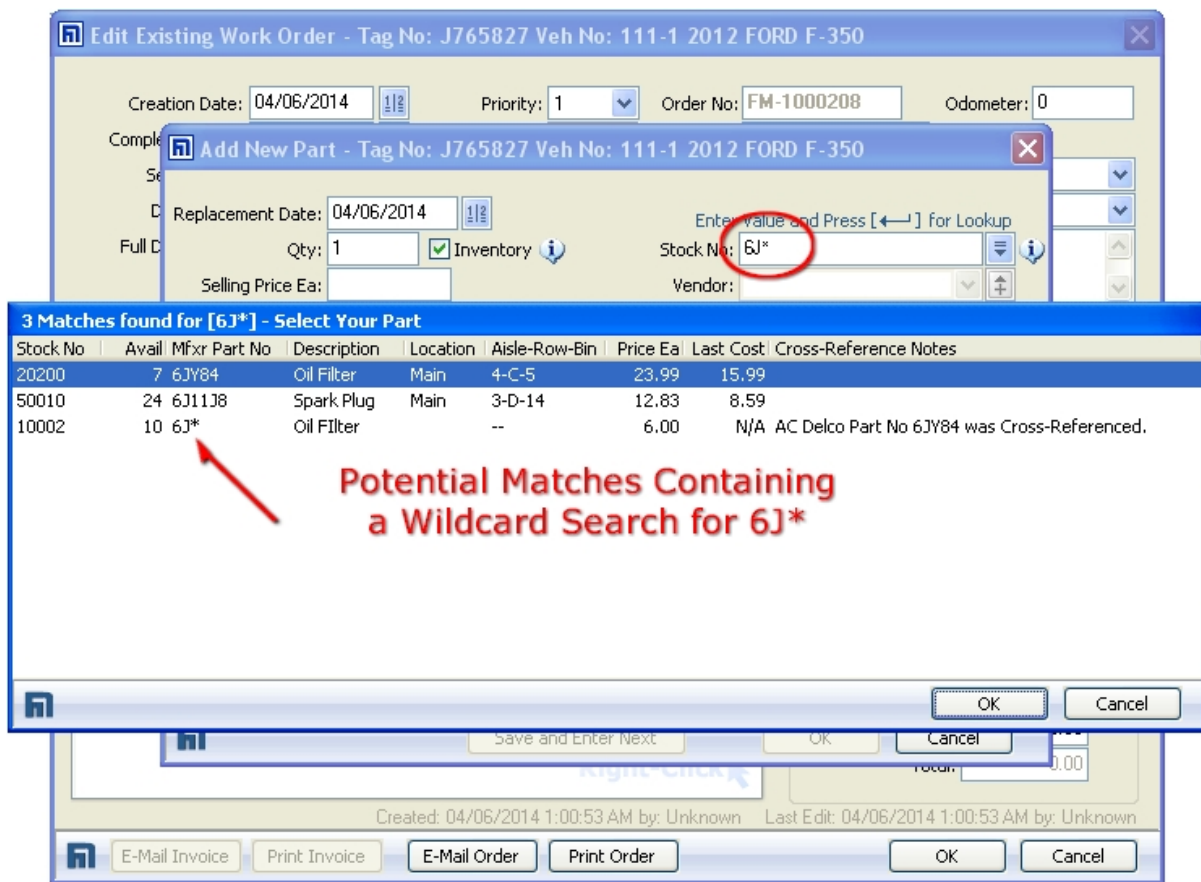
OK Cancel

Parts Window

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Adding A Parts Line to a Work Order – Wildcard Search

If you are using the Inventory feature in FLEETMATE and you are using the material Cross-Reference feature for your inventory items, you may also enter any portion of a part number and/or stock number using a wildcard search expression. Press [Enter] to execute the search. In the picture below, we are searching for any part number that begins with 6J. The trailing asterisk is a wildcard, which means we don't care what follows the 6J.



Potential Matches Using a Wildcard Search Expression

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 number that you have entered, you will be given a pick list of matching parts from which to choose, as pictured above.

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Adding A Parts Line to a Work Order – Inventory Pick List

The Stock No field also offers a *Pick 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.

Part Pick List

NOTE: The Inventory tab will not list stock items that are depleted.

Inventory | Previously Used Parts | Tire Management

Stock No ▲	Part No	Description	Location	Aisle-Row-Bin	Price Ea
11111	1111111111	Oxygen Sensor	Warehouse	6-3-24	52.75
20200	6JY84	Oil Filter	Main	4-C-5	23.99
22222	222	Oil Pan Gasket	Warehouse	2-G-17	41.15
66127	12343454	Head Gasket	Main Warehouse	D-21-C	56.90

Types: Repair Parts - General

Include All Vehicles

List Inventory Items Previously Used on This Vehicle Only

OK Cancel

Inventory Pick List Dialog

When selecting a part using the Inventory tab, you will first need to select the Inventory Type from the droplist. In the picture above, we have chosen “Repair Parts – General” as the Inventory Type. 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 types of parts 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.

CUSTOMER GUIDE: Work Orders**Adding A Parts Line to a Work Order – Inventory Pick List**

Once you locate the part you are looking for, double-click on it in the Pick List dialog. This will close the Pick List dialog and will place the available parts information 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 the selling price is still valid.

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Check the In-Warranty box if the replacement part is 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 part cost will not be added to parts subtotal on the work order. If the vehicle is considered 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. Uncheck the In-Warranty box if necessary.

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. You can also disable this function by entering zero in the "days" field.

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.

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Stock Items using Avg, FIFO or LIFO Cost

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 manually defined 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(s), 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.

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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 non-stock Parts window will appear. You will then need to complete the Parts window as you normally would.

Click the Scan Parts tab. Position your cursor in the blue text box, and scan the barcode for your part. As a scan is accepted, you will see the item appear in a list on the Scan Parts tab. Inventory is relieved immediately. The part will also be added to the Parts tab, which indicates that the part was actually relieved from inventory and issued 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 scanned (or manually entered), you will be given a pick list of matches from which to choose.

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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. There is no undo function available

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 the part being deleted was a tire that was originally issued from Tire Management, it will not be automatically dismantled from the vehicle. You will need to use the Tire Management window to manually dismantle the tire.

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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, 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 the current work order.

Select the View Mode for this attachment. The Display Image mode can be used for BMP, JPG, and GIF type image files that are no larger than 1600(h) x 1600(w) pixels in size. This mode will use the internal FLEETMATE image viewer to display your image.

The Launch Application mode is used to display large image files (larger than 1600 x 1600), 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, double-click on it.

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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. There is no undo function available.

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