

#### **CUSTOMER GUIDE:** How to Assign Work Orders

#### Overview

If you have many end-users that will be processing work orders, you may find the Work Order Assignment feature helpful.

This functionality enables a user to see only the work orders that they have been assigned. A user will not see a work order unless they have been assigned that work order. This way, work orders are distributed among many FLEETMATE users for processing.

### Requirements

In order to use the work order assignment feature, you will need to satisfy the following requirements:

- A personnel record exists for each end-user.
- A personnel record exists for at least one Fleet Manager.
- A security profile exists for each user.
  - o "Add/Edit Work Orders" permission has been granted.
- The Enforce Assignments feature has been activated.
  - Company Data | Company Information and Settings | Work Orders
- FLEETMATE security has been activated.

# Processing

A **Fleet Manager** must make all assignments.

A work order must be **Pending** (*i.e.* no labor and no parts information entered) at the time it is assigned to a user. Therefore, it will be best to assign the work order immediately following its initial creation.

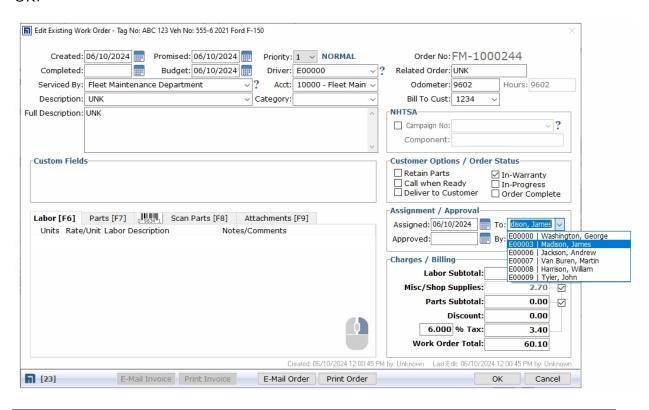
Do not add labor or parts records to the order until it has been assigned to a user.



### **CUSTOMER GUIDE: How to Assign Work Orders**

## Assigning a Work Order – Work Order Window

First, create the work order. With the Work Order window open, set the date Assigned, choose the user that the work order will be assigned to, and then click OK.



Work Order Assignment – Work Order Window

In the picture above, this pending work order is being assigned on June 10, 2024 to user E00003.

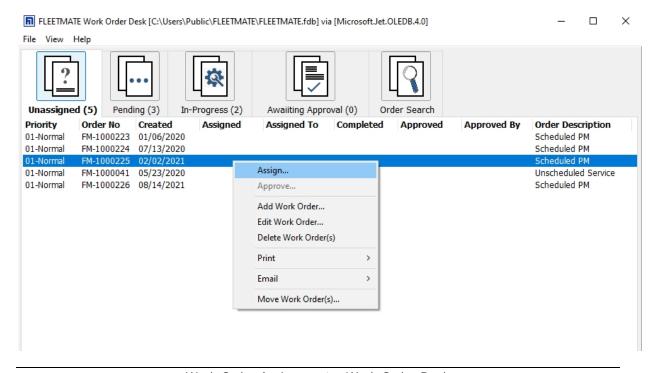
When user E00003 logs-in to FLEETMATE, they will see Order No FM-1000244 listed in the **My Pending Orders** tab.



### **CUSTOMER GUIDE: How to Assign Work Orders**

## Assigning a Work Order – Work Order Desk

You may find it convenient to assign a work order using the FLEETMATE Work Order Desk option. Using the **Unassigned** tab, simply right-click on the work order you wish to assign, and choose **Assign**... from the context menu.



Work Order Assignment – Work Order Desk

Select the user from the list that will be displayed, and then click OK.

The assignment will be date/time stamped automatically to today's date and time.