
CUSTOMER GUIDE: Work Order Desk

Overview

FLEETMATE Work Order Desk is an *optional* product. You may use FLEETMATE without using FLEETMATE Work Order Desk.

The Work Order Desk option focuses on existing work orders, and offers a variety of features to search your database for existing work orders. The Labor and Parts lines on your work orders may be edited, as well as completion date, completion status, and full description fields, provided that FLEETMATE security settings provide adequate permissions.

Work Order Desk also enables a user designated as a *Fleet Manager* or a *Director* to assign work orders, and to approve work orders that have been completed.

The work order assignment function will determine the work orders that will be listed under the *My Pending Orders* and *My In-Progress Orders* tabs on the main window in the FLEETMATE client program.

The Work Order Desk program is an optional add-on to the base FLEETMATE software, and must be licensed separately. The Work Order Desk license is included *free of charge* with any Corporate Site license purchase. Simply use your existing Corporate Site License registration key to license the software at no additional charge.

Functional Requirements

The FLEETMATE Work Order Desk was designed primarily for Fleet Managers to locate, review, assign, and approve work orders..

The FLEETMATE Work Order Desk software requires that FLEETMATE security be active. You will also need to designate employees that are Fleet Technicians, Fleet Managers, and Directors. These settings can be found in your Personnel records.

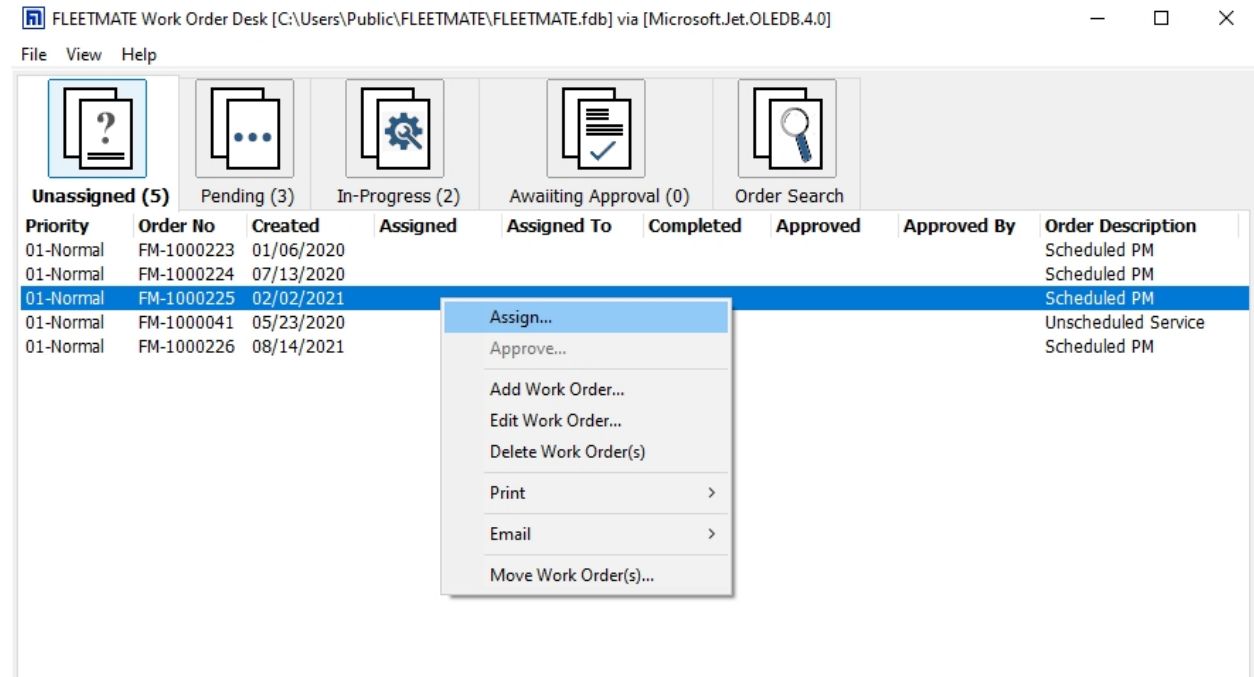
Only a Fleet Technician may be assigned a work order. Only an Administrator, a Fleet Manager, or a Director may approve a work order.

A work order cannot be assigned to an Administrator.

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Main Window Tabs

The Work Order Desk software provides five (5) tabs on the main window as pictured below.



Work Order Desk – Main Window

In the picture above, the software is listing *Unassigned* work orders. As in all FLEETMATE products, a right-click will produce a context menu of options from which to choose.

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Main Window Tabs

The Work Order Desk software provides five (5) tabs on the main window as pictured below



Unassigned

This tab lists all work orders that have not yet been assigned. Provided you have adequate security permissions, you may edit, print, and email work orders. You may also add a new work order from this tab.



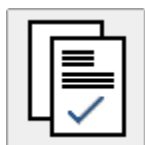
Pending

This tab lists all work orders that are pending. A pending work order has no completion date, no labor lines, and no parts lines. Provided you have adequate permissions, you may edit, print, and email work orders.



In-Progress

This tab lists all work orders that are in-progress. An in-progress work order has no completion date, but does have at least one (1) labor line and/or one (1) parts line. Edit, print, and email functions are provided.



Awaiting Approval

This tab lists all work orders that are completed, and that are awaiting approval by a Fleet Manager, a Director, or an administrator. Edit, print, and email functions are also provided.



Order Search

This tab provides a number of search features that will make it easy to locate one or more work orders. Provided you have adequate permissions, you may also edit, print, and email work orders.

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Order Search Tab

The Order Search tab in the Work Order Desk software offers two (2) primary search functions: *Quick Search* and *Saved Searches*.

Quick Search

The screenshot shows a 'Quick Search' form with four input fields: 'Order No:', 'Part/Stock No:', 'Veh No:', and 'VIN/SN:'. Each field has a corresponding barcode icon to its right. Below the fields is a checkbox labeled 'Exact Match'.

This feature offers a fast way to locate work orders based on:

- **Work Order Number**
- **Part Number**
- **Vehicle Number**
- **VIN**

Type a value you are searching for, then press [Enter]. If you have a barcode scanner, simply scan the barcode for the value you are searching for.

If you want a search based on an exact match of the value you specify, click *Exact Match*. Otherwise, all records that *contain* your search value will be listed.

Date Range Limit

This feature works in conjunction with the Quick Search feature to help limit the number of work orders that would otherwise be listed.

The screenshot shows a 'Date Range Limit' form. It includes a checked checkbox 'Find Work Orders with Creation Dates From:' followed by a date input field '01/01/2021', a calendar icon, a 'To:' label, another date input field '08/17/2021', a second calendar icon, and a checked checkbox 'Always Today's Date'.

Specify a beginning and an ending date. When active, only work orders that were created within the date range specified will be listed.

The Date Range Limit feature does not function with Saved Searches. This is because you can explicitly define your date criteria.

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Saved Searches

The Saved Searches feature enables you to define your search criteria, and then save the search for re-use later. Simply drop the list of your save searches and click the saved search you wish to run. It will execute immediately. You can Save and Delete saved searches as needed

Table	Field	Operator	Value
Maintenance	FL_COMPLETED	<>	1

A saved search is made up of one (1) or more conditions. Each physical line in the saved search list area represents one (1) condition.

To add a condition, click the button. Click the button to remove a condition.

Set your column values from left to right, beginning with the **Table** you wish to search.



- ❖ Select the Table
- ❖ Select the Field you wish to search by.
- ❖ Select the Operator you wish to use.
- ❖ Enter the Value you wish to search for and then press [Tab].
- ❖ You may now click [Search] to execute your search.

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Saved Searches

To add another condition, click the  button. You may define any number of conditions per search.

If you find that you repeatedly use the same search, you can choose to save the search. You can then reuse the saved search at any time simply by selecting it from the Saved Searches droplist. To save your search, do the following:

- ❖ Type the name for your saved search
- ❖ Click  to save the search.
- ❖ To delete a saved search, select it, then click 

To execute a saved search, drop the list and click the saved search you wish to run. This will immediately execute your search.

You may store any number of saved searches.

Saved Searches are *global* within a FLEETMATE database. This means that all users logged into a specific FLEETMATE database, will see all of the saved searches stored in that database.

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More on Saved Searches

Conditions defined in your search are **AND**ed together, and evaluated as a compound expression. There is no support for evaluating conditions using **OR** or **XOR** logical expressions.

Saved Searches

Any Type of Filters Replaced on Blue Ford Vehicles

Table	Field	Operator	Value
Vehicle	TX_PAINTCOLOR	Contains	blue
Vehicle	TX_MAKE	=	ford
Parts	TX_DESC	Contains	filter

Save
Delete

+
-

Clear

Search

A Saved Search Containing Three Conditions

In the above example saved search, there are three (3) conditions. If written in English, this search would read:

- **Return all work orders where:**

The vehicle Color *contains* the word blue

and

The vehicle Make *equals* ford

and

Replacement parts descriptions on work orders *contain* the word "filter."

Some additional points to consider with this saved search are:

- Work orders that do not have parts lines, will not be listed.
- Both stock and non-stock replacement parts records will be found as long as the part description contains the word "filter."

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Additional Notes on Program Use

The value(s) in search conditions that you define are not case-sensitive.

FLEETMATE security will need to be active in order for the Work Order Desk software to be fully functional.

The Work Order Desk software will follow security settings defined in your FLEETMATE database. Use the same Username and Password that you use when using FLEETMATE itself.

When security is active, your user profile defined for you by your FLEETMATE administrator must grant permission to edit work orders. Otherwise, your access will be read-only. You can still query your database to search for and view/print/email work orders, but you will not be able to edit work orders unless you have been granted permission to do so.

When Work Order Desk starts it will open the database that was last opened using FLEETMATE.

Saved Searches are not assigned to a specific user. Therefore, anyone using Work Order Desk will see all saved searches that are stored in your FLEETMATE Database. Be careful not to delete a saved search that may have been created by a co-worker for a specific purpose.