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## 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.
  - "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.***

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### 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.

**Edit Existing Work Order - Tag No: ABC 123 Veh No: 555-6 2021 Ford F-150**

Created: 06/10/2024 Promised: 06/10/2024 Priority: 1 NORMAL Order No: FM-1000244  
 Completed: Budget: 06/10/2024 Driver: E00000 Related Order: UNK  
 Serviced By: Fleet Maintenance Department Acct: 10000 - Fleet Main Odometer: 9602 Hours: 9602  
 Description: UNK Category: Bill To Cust: 1234

Full Description: UNK

**Custom Fields**

**NHTSA**  
 Campaign No: ?  
 Component:

**Customer Options / Order Status**  
 Retain Parts  In-Warranty  
 Call when Ready  In-Progress  
 Deliver to Customer  Order Complete

**Assignment / Approval**  
 Assigned: 06/10/2024 To: dison, James  
 Approved: By: E00000 | Washington, George  
 E00003 | Madison, James  
 E00006 | Jackson, Andrew  
 E00007 | Van Buren, Martin  
 E00008 | Harrison, William  
 E00009 | Tyler, John

**Charges / Billing**  
 Labor Subtotal: 2.70  
 Misc/Shop Supplies: 0.00  
 Parts Subtotal: 0.00  
 Discount: 0.00  
 6.000 % Tax: 3.40  
 Work Order Total: 60.10

Created: 06/10/2024 12:00:45 PM by: Unknown Last Edit: 06/10/2024 12:00:45 PM by: Unknown

[23] E-Mail Invoice Print Invoice E-Mail Order Print Order OK Cancel

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.

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### 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.

The screenshot shows the FLEETMATE Work Order Desk application window. The title bar reads "FLEETMATE Work Order Desk [C:\Users\Public\FLEETMATE\FLEETMATE.fdb] via [Microsoft.Jet.OLEDB.4.0]". The menu bar includes "File", "View", and "Help". The toolbar contains icons for "Unassigned (5)", "Pending (3)", "In-Progress (2)", "Awaiting Approval (0)", and "Order Search". Below the toolbar is a table of work orders:

Priority	Order No	Created	Assigned	Assigned To	Completed	Approved	Approved By	Order Description
01-Normal	FM-1000223	01/06/2020						Scheduled PM
01-Normal	FM-1000224	07/13/2020						Scheduled PM
01-Normal	FM-1000225	02/02/2021						Scheduled PM
01-Normal	FM-1000041	05/23/2020						Unscheduled Service
01-Normal	FM-1000226	08/14/2021						Scheduled PM

A context menu is open over the selected row (FM-1000225), showing the following options: Assign..., Approve..., Add Work Order..., Edit Work Order..., Delete Work Order(s), Print >, Email >, and Move Work Order(s)...

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.