

# Work Orders and Calendar Scheduling

Last Modified on 05/20/2022 5:03 pm EDT

## Enter Work Order on Existing Customer

1. From the *Master Menu*, select **Work Orders** or, on any window, press **CTRL+S**.
2. From the *Work Order Menu*, choose **Work Order Entry**.
3. On the *Work Order Entry* window, press **CTRL+C**.
4. On the *Select - Customer* window, select the customer to enter the Work Order for and choose **Select**. If a customer number does not exist, press **Tab**.
5. In the *Customer #* field, press **Tab**.
6. If the customer has more than one tank, select the tank the Work Order is for on the *Select - Tank/Customer* window and choose **Select**.
7. The *First Name*, *Last Name*, *Name*, and *Divisions* will update automatically. Press **Tab** through these fields.

Date	Time	Entered By	MJM2320		
Order #	Customer # Name	Division Type	Status	Sched Date	Sched Time
5552	15193 A.D.R. HOLSTEIN INC	1 17	4	04/30/14	00:00
6156	27258 ACTON, THOMAS G	1 10	4	05/01/14	00:00
5580	19048 ALLEMAN FARMS, INC	1 17	2	00/00/00	00:00
5315	11403 ALLEN, MIKE & JENNIFER	1 15	2	00/00/00	00:00
5996	12363 AMES TRENCHING & EXCAVATI	1 15	4	11/08/13	00:00
6088	12816 ANDERSON, GLEN A	1 17	4	00/00/00	00:00
6118	19357 ANDREW, GLORIA	1 4	4	12/21/13	00:00
6191	27273 ARENDS SANITATION	1 17	4	00/00/00	00:00

Work Order Type: MISC      Work Order Status: WORK SCHEDULED

Customer: Work Order    Job Detail/Comments

First Name:      Last Name: A.D.R. HOLSTEIN INC

Requested By: MJM      Permit Number: 0

Billing Address: 2119 110TH ST

Billing Addr2: % DON STOLL

Billing City: STORY CITY      State: IA      Zipcode: 50248-7593

Home Phone: (515)432-5928      Work Phone: (000)000-0000

Cell Phone: ( ) -      Pager: ( ) -

Delivery Address: 1553 E Lincoln Way      City: Ames      State: IA

County: 99 UNKNOWN COUNTY      Pump Out:

Township: 209 BOONE HARRISON      Present Supplier:

Route: 2007 DAVID WAGNER      Terms Code: 99 Good Credit

Show ALL

Credit Info.

Gas Check

Lease Agreement

Appliance Info

Update Customer

Close

Modify    Print




8. In the *Type* field, enter the code for the type of work that will be performed or press **F5** to select the Work Order Type from the list.
9. In the *Status* field, enter the Status Code for the Work Order.
10. If the work has been scheduled, enter the scheduled date in the *Sched Date* field. If the work has not been scheduled, press **Tab**.
11. If the work has been scheduled, enter the scheduled time in the *Sched Time* field. If the work has not been scheduled, press **Tab**. In the next field, enter *A* for AM or *P* for PM.
12. Enter who requested the work in the *Requested By* field.
13. Enter the *Permit Number*.
14. The *Billing Address*, *Phone Numbers*, *Delivery Address*, *County*, *Township*, and *Route* fields will update



Division	Code	Schedule Type Description	# Allowed Per Day
1	1	Tank Set	2
1	10	Replace Outdated Regulator	0
1	11	LP Leak Check Odor Complaint	0
1	12	PickUp Tank	0
1	13	Repair/Replace Service Valve	0
1	14	Pump Out Tank	0
1	15	ReLocate LP Tank	0
1	16	Repair Heater	0
1	17	Misc Work	0
1	18	Shawn Welcher Out	0
1	19	Denny Snodgrass Out	0
1	2	Repair Damaged Line	0
1	3	Disconnect Tank	0
1	4	Tank Gauge Leaks	0
1	5	Buried Gas Line	0
1	6	Re-Lite Pilot Light	0
1	7	Level Tank	0
1	8	Locate LP Line	0
1	9	Reconnect Service-Tank	0

From Work Order Type

Div	Type	Description	Allowed Per Day
1	1	TANK INSTALL	4
1	2	LP LINE REPAIR	4
1	3	DISCONNECT SERVICE	6
1	4	ODOR/LEAK COMPLAINT	2
1	5	INSTALL LP LINE	4
1	6	RELITE PILOTS	0
1	7	RELEVEL TANK	0
1	8	LOCATES	0
1	9	RECONNECT SERVICE	6
1	10	REGULATOR UPDATE	6
1	11	GAS/LEAK CHECK	0
1	12	TANK PICKUP	4
1	13	TANK REPAIR	2
1	14	TANK PUMPOUT	2
1	15	TANK RELOCATION	4
1	16	HEATER REPAIR	0
1	17	MISC	0
1	18	Shawn Welcher Out	0
1	19	Denny Snodgrass Out	0
1	20	Tank Switch	4
1	21	UNDERGROUND CATHODIC TEST	2
1	99	POTENTIAL CUSTOMER	10
2	21	Underground Cathodic Testing	2
6	1	Tank Set	0
6	2	Repair Damaged Line	0

After the cross referencing is done between Calendar Scheduling and Work Orders, start scheduling by pressing **F5** while in the *Date* field on the *Work Order* screen.

Available Dates

Div	Date	Type	Free

May 2014

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

<< < **Schedule** > >>

Display Sched History

Div	Customer #	Date	T-Div	Type	Sch T...
1	27258	05/01/14	1	10	00:00
1	11051	05/01/14	1	17	00:00

Filled Schedules

Div	Type	Sched Date	Dly Tot	Allowed
1		05/01/14	0	0
1		06/01/14	0	0
1		03/19/20	0	0
1		05/16/20	0	0

Name

Route

