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.
- 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.

D	ate 05/23/13	Time 16:59 Entered By	MJM2320							
	Order #	Customer # Name		Divis	ion 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 & EXCAVA	ATI	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	-	
W	Vork Order Type	MISC		Work Order S	tatus	WORK SCHE	DULED			
Custor	mer Work Order	Job Detail/Comments						Show	ALL	
	First Name Requested By	MJM	A.D.R. H	OLSTEIN INC Permit Number	0			Credit Info.		
	Billing Address	2119 110TH ST								
	Billing Addr2	% DON STOLL						Gas C	heck	
	Billing City	STORY CITY Sta	te IA	Zipcode 5024	8-7593			Lease Ag	reemen	
	Home Phone	(515)432-5928 Work Phone (0	00)000-000	00				Applianc	a lafa	
	Cell Phone	() - Pager () -							
	Delivery Address	1553 E Lincoln Way	City	Ames		Sta	te IA	Update C	ustome	
	County 9	Q UNKNOWN COUNTY		Pump Out				Close		
	Township 209		1	Present Supplier				Modify	Print	
	Route 2007		Terms	Code 99 Q	Good Cred	lit		MOREY	FIEL	

- 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

automatically. Press Tab through these fields.

- 15. In the Pump Out box, enter Y if there will be a pump out or N if there will not be a pump out.
- 16. Enter the Present Supplier.
- 17. The Terms Code field will update automatically. Press Tab.
- 18. On the *Work Order* tab, the tank and meter information will update automatically. Press**Tab** through these fields.
- 19. In the Service team field, enter the Service Team Code or press F5 to select the Service Team from the list.
- 20. Press Tab in the Close Date field.
- 21. Press Tab in the Hrs on Job field.
- 22. The Directions field will update automatically. Press Tab.
- 23. On the Work Req/Cmpltd/Comments tab, enter the work that has been requested in the Work Requested field.
- 24. Enter the work that has been performed or any additional information about the work in the *Work Performed* area.
- 25. Enter any additional Comments about the Work Order or customer.
- 26. Select Save.

Choose the **Search** icon (or press **F5** or double-click) for scheduling from the Work Order Schedule Date to see what days are available.

The following cross reference table must be built to utilize Work Orders and Calendar Scheduling.

alendar I	Div Cal Sched Ty	pe Code Schedule Type Description	WO Division	WO Type	W.O. Type Desc.	Allowed Per Day
1	1	Tank Set	1	1	TANK INSTALL	4
1	10	Replace Outdated Regulator	1	10	REGULATOR UPDATE	6
1	11	LP Leak Check Odor Complaint	1	11	GAS/LEAK CHECK	0
1	12	PickUp Tank	1	12	TANK PICKUP	4
1	13	Repair/Replace Service Valve	1	13	TANK REPAIR	2
1	14	Pump Out Tank	1	14	TANK PUMPOUT	2
1	15	ReLocate LP Tank	1	15	TANK RELOCATION	4
1	16	Repair Heater	1	16	HEATER REPAIR	0
1	17	Misc Work	1	17	MISC	0
1	18	Shawn Welcher Out	1	18	Shawn Welcher Out	0
1	19	Denny Snodgrass Out	1	19	Denny Snodgrass Out	0
1	2	Repair Damaged Line	1	2	LP LINE REPAIR	4
1	3	Disconnect Tank	1	3	DISCONNECT SERVICE	6
1	4	Tank Gauge Leaks	1	4	ODOR/LEAK COMPLAINT	2
1	5	Buried Gas Line	1	5	INSTALL LP LINE	4
1	6	Re-Lite Pilot Light	1	6	RELITE PILOTS	0
1	7	Level Tank	1	7	RELEVEL TANK	0
1	8	Locate LP Line	1	8	LOCATES	0
1	9	Reconnect Service-Tank	1	9	RECONNECT SERVICE	6
		Ctrl+C F5 to Zoom			Ctrl+C F5 to Zoom	
		Select Calendar Schedule Type			Select Calendar Schedule	Tuno

From Calendar Scheduling

Division	Code	Schedule Type Description	# Allowed Per Day	1
þ	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	r
1	2	Repair Damaged Line	0	1
1	3	Disconnect Tank	0	L
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

	Туре	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 1 12		GAS/LEAK CHECK	0				
		TANK PICKUP	4	=			
1	13	TANK REPAIR	2	-			
1	14	TANK PUMPOUT	2				
1 15 1 16		TANK RELOCATION	4				
		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				
	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.

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