Work Orders and Calendar Scheduling

Last Modified on 02/12/2026 11:52 am EST

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.

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

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 *Job Detail/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.

Use this screen to build a cross reference table between the Work Order Types Maintenance and Calendar Scheduling Types Maintenance, for use during work order/calendar interface.

Calendar Div	Cal Sched Type 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			Ctrl+C	
		F5 to Zoom			F5 to Zoom	
		Select Calendar Schedule Type			Select Calendar Schedule Type	

From Calendar Scheduling

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

Create   Modify   Cancel   Copy To Anot

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.