

Repair Orders

There are 3 types of Repair Orders (ROs). Company Vehicle, Vendor Third Party and Sales to Customer and a Default type can be set to any of the 3 in your setup. With a Company Vehicle RO you are working on your own vehicles and are concerned with Cost not Price. Vendor Third Party ROs are available for you to enter and maintain a history of the work done on your vehicles when they are out on the road or any work not done at your shop, such as at a body shop. This enables all the maintenance history for a vehicle to be maintained in one place and quickly viewed. Sales to Customer ROs are set up to help you invoice and keep track of inventory used. The Header on each RO is slightly different to allow for information pertinent to each type. The Vendor RO has a field for Vendor ID.

This screenshot shows the 'Vendor Repair Order Entry - # 200132 - NEW REPAIR ORDER' window. The 'Vendor and Unit Information' section is visible, containing fields for 'Vendor ID' (highlighted in yellow), 'Unit Type' (highlighted in yellow), 'ID' (highlighted in yellow), and 'Contract #' (highlighted in yellow). A 'PMs Due' button is also present.

The Sales to Customer RO has a field for Customer ID.

This screenshot shows the 'Customer and Unit Information' section of the repair order entry screen. It includes fields for 'Cust ID' (highlighted in yellow), 'Unit Type' (highlighted in yellow), 'ID' (highlighted in yellow), and 'Contract #' (highlighted in yellow). A 'PMs Due' button is also present.

The highlighted field might look different than yours, because that is a User Defined Label. This field is also optional. When you click on the PMs Due button the PM Selection Screen pops up with the scheduled PMs for this vehicle. This screen shows you when each PM is due and if any are due now (note the asterisk in the due column). You can mark one or more PMs that you want to add to the RO using the Mark PM button and then add them to the RO by using the Add to RO button. If there are any parts or services connected to the PM they are automatically added to the RO.

This screenshot shows the 'PM Selection Screen'. The table displays scheduled maintenance items with the following data:

Due	Add	Type	Desc	Days	Miles	Hub	Hours	Service
*		INSPECT	INSPECT THE HEADLITES	-9999	0	0	0	
		ROUTINE	Truck Oil Change	0	0	95625	0	

At the bottom of the screen are buttons for 'Add to RO', 'Mark PM', and 'Quit'.

The next section is for general RO information. The Shop ID can be set as a default. Remember you can have multiple shops! Repair Class and Delay Code are optional. They are also User Defined fields if you would like to change their label in order to use that field for an in-house code.

Shop Information							
Shop ID	01	Order Date					
Promised	08/29/16	At	:	Completed	/ /		
Down Date	08/29/16	At	:	Repair Class	<input type="checkbox"/>	Delay Code	<input type="checkbox"/>

The next section is for meter information and is optional. If you are using one of the possible 3 meters on the vehicle the “last” line will fill in automatically; pulling from the last RO entered for that vehicle OR the optional fuel entry section OR Dispatch/Tickets if you use those modules. You fill in the current meter reading.

Meter Data			
	Hub	Speed	Chr
Current	0.0	0.0	0.0
Last	0.0	0.0	0.0

The next sections are for Services and Parts. These are like our other browsers; the columns can be user defined and changed if so desired in the screen setup.

The bottom section has an optional User ID field, optional Miscellaneous charge field and optional Sales Tax area. If you are doing a Sales to Customer RO you can setup the tax rate in each Customer and Customers can of course have different tax rates! The tax is then automatically calculated on the Services and/or Parts that you have marked as taxable in their master files.

User		Misc Chrg	0.00				
Ok	Cancel	Tax Rate	0.000	Tax	0.00	RO Total	0.00

The Repair Order Browser as with most of our browsers can be user defined as to what information you would like at your finger tips by choosing your own columns.

By using the Index button you can choose to see ALL of your RO's or only your UNPOSTED ones, and you can choose to sort between 3 different options. You can have notes on repair orders and a column can be used to signify that a note exists. You can also have an Image associated with the RO. RO Images are handy for many situations, whether it is pictures of damage to the vehicle, or a scan of the Vendor Invoice or any idea you can think of! You are also not limited to image file types, you can use PDFs or Word documents too!

You have two choices when you Print a RO. The full RO Print option is handy to give your shop personnel on a clip board so they can note each item they need to attend to and make their own notes on the parts, services and time spent. You can choose to print Detailed or Summary. You can also print an Invoice. You can choose to add the RO notes to the invoice and there is a user defined RO disclaimer added to the bottom of the Invoice.

Posting once a RO once it is completed adjusts the Parts Master file as needed and sends information to your accounting module if you are set up accordingly.