# **ProTrac Work Orders**

Repair by your Service People or Repair done by an outside service both handled by ProTrac

ProTrac Work Order Process is a complete package that includes maintaining control over work that is done in your shop or sent out to a 3<sup>rd</sup> Party for Repair.

Either way when the customer calls to find out the status you do not need to be going through a Work Order Tub.

Just go to Work Order Search and search for the document by account or sales rep and the work order will be displayed. Each day the Work Order can be updated with parts and Labor.

When it is done a keystroke will convert the work order to an invoice that can be sent out via fax, email, or it can be printed and mailed.

Once invoiced - you can find the Work Order by Serial number, Tag Number, Account, Sales Rep, or even by the person who brought the tool, truck or machine in for repair.

800-711-7374

Mel Carney Professional Data Systems, Inc. 6/3/2015



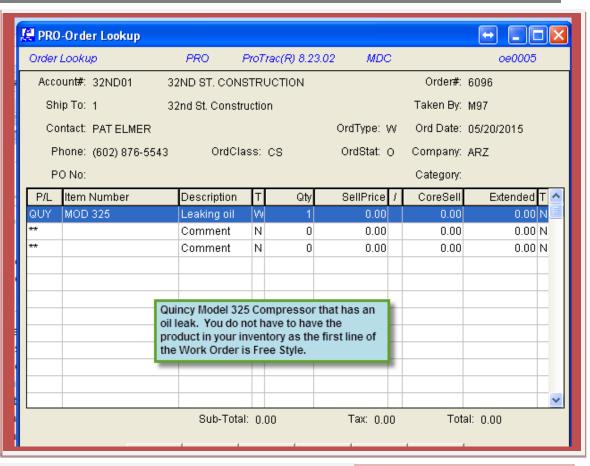
## **Work Orders on ProTrac**

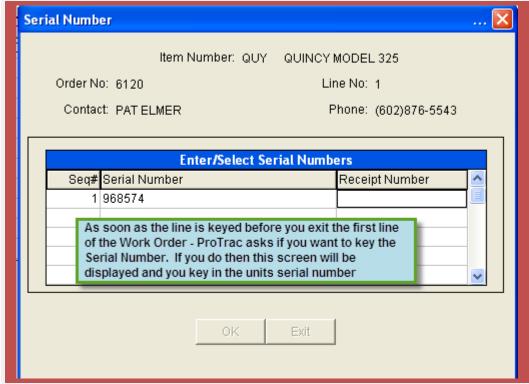
This is the first screen of our Work Order.

The first line of the order is virtually free form. The SR can key anything that describes the tool, machine, or vehicle.

In this case it is Quincy Model 325 Compressor that is leaking oil.

As soon as the line was keved the Question comes up about recording Serial Numbers (31 Alpha Numeric numbers). (Next Page)

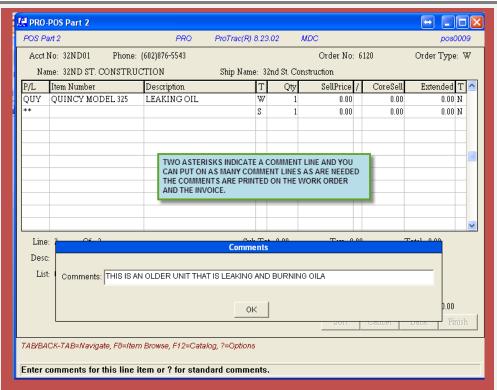




The screen is displayed to key a number that identifies this unit or

If you use tags (Receipt Number) to ID your repair work, ProTrac can help you keep track with a Tag Number.

With ProTrac you can search for either the serial or tag number. You can also find the unit based on the person who brought it in for repairs.

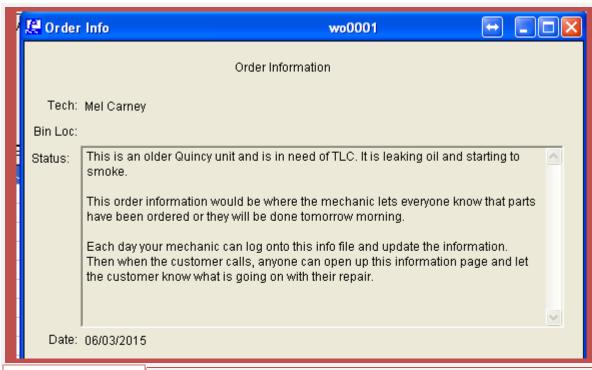


Once the first line is complete the Sales Rep can add a note to the line to describe the initial problem.

You can put in a four line note or a single line note. If you need two single lines you can do that as well.

This note has 30 characters that will print on the Work Order and the Invoice.

THIS IS THE PRINTED WORK ORDER THAT CAN BE GIVEN TO THE MECHANIC OR PUT UP ON THE SHOP'S BULLETIN BOARD. THIS WORK ORDER DATE: 06/03/2015 TIME: 13:53:40 32ND01 IS NOW IN PROTRAC ACCT NO: TERMS: 2%10 NET30 SLS ID/REP: MDC / SUE PO NUM: ANYONE CAN KEY IN THE PARTS AND LABOR JOB: TIME THAT IS ASSOCIATED WITH THE REPAIR. SHIP VIA: Customer Pickup OR THEY CAN CHECK THE STATUS OF THE WORK TAX EXEMPT#: 698543 ORDER. PAGE: 1 ORDER: 6120 SHIP TO: 32nd St. Construction 29012 N. 32ND ST. 32ND ST. CONSTRUCTION 29012 N. 32ND ST. PO BOX 1827 PHOENIX, AZ 85053 SUITE 1625 PHOENIX, AZ 85056 USA PAT ELMER PH: (602)876-5543 WORK FAX: (602)485-5654 ORDER \*----QUANTITY---\* кУT TOTTO ITEM NUMBER DESCRIPTION ORDER SHIP B/0 AMOUNT PRICE OUY OUINCY MODEL 325 LEAKING OIL 0.00 O.OON S#: 968574
THIS IS AN OLDER UNIT THAT IS LEARING AND BURNING OILA SERIAL NUMBER IS YOU CAN PUT IN AS MANY COMMENT LINES AS ARE NEEDED NOW PERMANENTLY ATTACHED TO THIS ENSURE THAT ALL PARTS AND LABOR HOURS ARE GIVEN TO MARY IN ACCOUNTING BEFORE 4PM EACH DAY COMPRESSOR YOU WILL BE ABLE TO FIND THIS UNIT WITH ITS SERIAL NUMBER FROM NOW ON SUB TOTAL: 0.0 WEIGHT: . 00 TAXABLE: . 00 TENDER: .00 CA NON-TAX: CHANGE: .00 LABOR: .00 TAX: .00 RECEIVED BY Delivery . 00 8 TST PRO INV TOTAL: .00

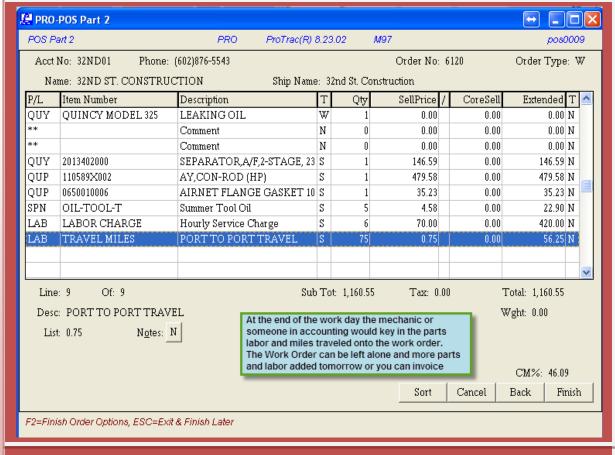


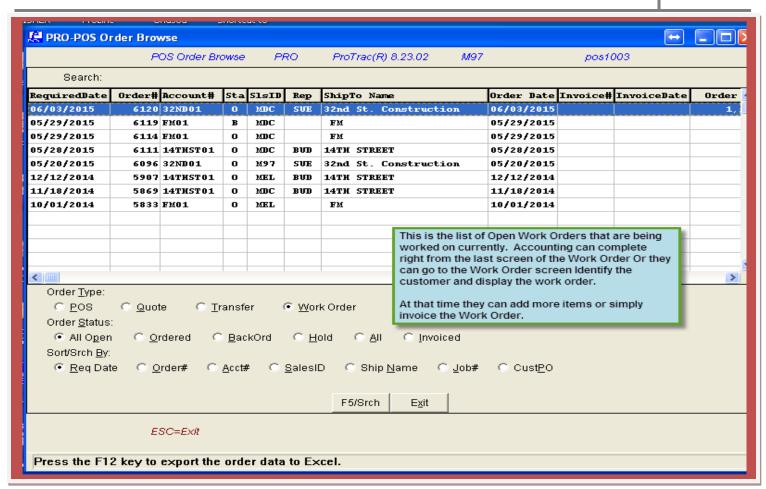
Each day your mechanic or inside clerical person can open up this information screen and key in an update on this unit.

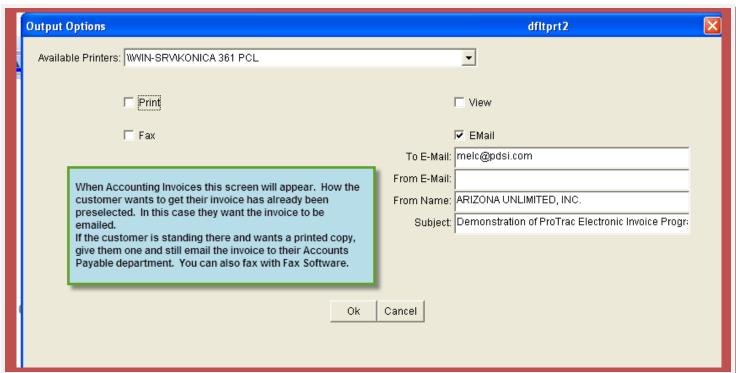
Whoever closes out this ticket will key in the labor and parts used to fix this device.

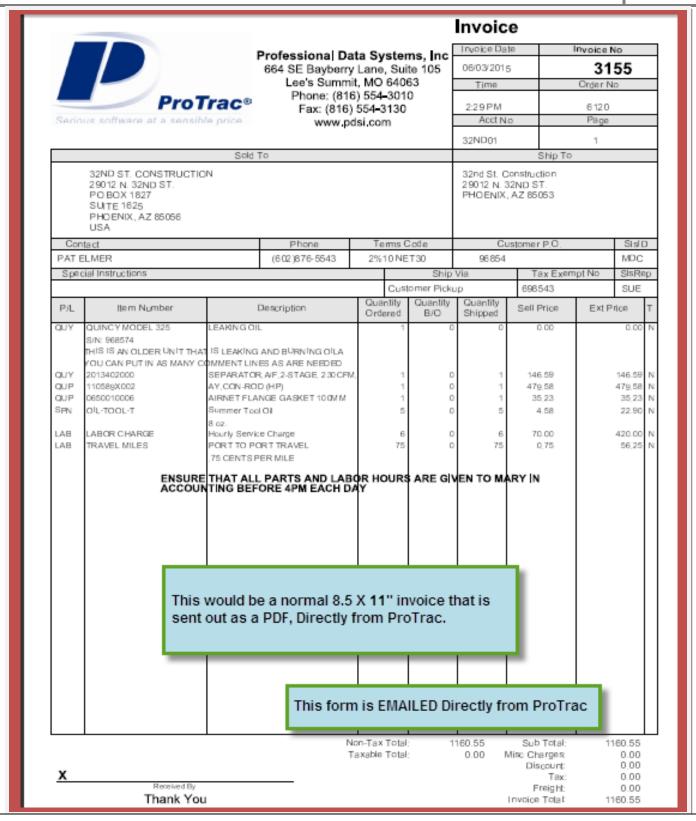
The Labor can have a labor rate for each individual mechanic already loaded in the system. It would be just like an inventory item without any on hand.

If Mangement varies the Labor rate for individual customers that change can be reflected in the charges. Everyone does this a little differently so we give you options.









The next two pages cover repairs that you have an outside firm do for you. All of the above is still in effect, except your billing will just add a % up charge for your company



Repair work that is sent out to a 3<sup>rd</sup> Party Repair Facility

Some repairs are sent to an outside repair facility. You would still create the WO and fill out this information so anyone can answer the customer status question.

This info needs to be updated if a repair is going to take longer at Matt's Repair

### Matt's Repair Invoiced for \$75.00



Matt's Repair has sent you an invoice for \$75.00 for this WO. The first line on the WO has no cost so ProTrac displays this screen so you can put in the \$75.00 cost and whatever your mark up is for this job. For this example I have billed for \$125.65.

The invoice below would also be an electronic invoice.

#### DANNISTED AUTO PARTS DATE: 03/30/2010 TIME: 16:21:03 ACCT NO: AATHAN2 SLS ID: MDC KANSAS CITY, MO 64131 PO NUM: SHIP VIA: Customer Pickup TAX EXEMPTs: 89765 Phone: (816)941-8887 Fax: BILLED AT LEES SUMMIT, HO LOCATION PAGE: 1 ORDER: 4590 INVOICE: 2449 SOLD TO: SHIP TO: A4T MANUFACTURING A4T MANUFACTURING 7609 TROOST 7609 TROOST KANSAS CITY MO 64131 Kansas City MO 64131 PH: (816)444-3931 FAX: (816)343-3955 INVOICE Mary McDonald \*----QUANTITY---\* WORTE OPDER SHIP B/O PRICE AMOUNT ARC DUMP 100 Gallons Per Secon 0.00 0.00N P#: 36524 S#: AYM 695658 125.65 125.65N ZZZ REPAIR REPAIR The unit will not hold pressure. After 5 minutes it will hardly pump 2 Gallons a Second You can put in as much description about the bill as you need for the customer ENSURE THAT ALL PARTS AND LABOR HOURS ARE GIVEN TO MARY IN ACCOUNTING BEFORE 4PM EACH DAY Invoice total due by 05/10/2010. SUB TOTAL: 125.65 .00 TAXABLE: .00 CH NON-TAX: 126.28 TENDER: .00 LABOR: TAX: .00 DECETUED BY

# **ProTrac's Work Order Program**

Parts Back Orders: You can Back Order Parts for a WO and when the parts arrive they will be for WO 4985.

To keep paperwork manageable we handle a back order for a WO differently than a normal customer back order.

**Contact Mel Carney and find** out how we have made this more user friendly.