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Work Order Implementation Guide

OSAS 7.x

This guide explains the necessary tables and codes that must be setup in order to utilize the software. The menu items are located with in Work Order, either on the Codes Maintenance or File Maintenance menus.

Where appropriate we have provided sample entries and left blank areas to be used as a worksheet to collect the information for your company.

User Defined Terminology - Customize the screen prompts for specific fields to reflect the terminology of your particular business.

Status Date Assignments – When the status of a work order changes, the date & time are recorded automatically. This table is used to assign the status for up to 99 dates.

The Table has two fields: Date Code XX (00-99)
Description XXXXXXXXXXXXXXXXXXXX

Date Code	Description
01	Entered
02	Requested
03	Scheduled
04	Assigned
05	Dispatched
06	Complete
07	Invoice
08	Quote
09	Date Held
10	Work Order Printed
11	Invoice Printed

Status Codes – These codes are used to track the various stages of the work order. The codes are user defined and you can setup as many as you need, however there are three status codes that must be defined. You must have a status code for complete, invoice printed, and post.

The table contains the following fields:

Status Code	XXX	
Description	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Sort Order	00.00	(currently not used within the system)
Date/Time Stamp	00	(00-99)
Show on Dispatch	X	(used with the scheduler)
Hot Key	X	(used for quick flagging of the status)
Status Action	0	(0=Other, 1=Printed, 2=Complete, 3=Scheduled, 8=Invoice Printed, 9=Post)

Code	Description	Sort	Date/Time	Show on Disp	Hot Key	Action
N	New Work Order	00.0	01	Y	N	0
C	Completed	00.0	06	Y	C	2
I	Ready to Invoice	00.0	07	Y	I	9
Q	Quote	00.0	08	N	Q	0
R	Ready to Review	00.0	09	N	H	0
S	Scheduled	00.0	03	Y	S	3
D	Dispatched	00.0	05	Y	D	0
INP	Invoice Printed	00.0	11	N		0
PRN	Workorder Printed	00.0	10	Y		1

Skill Levels - Used to assign skill level to your technicians. This is only required for automated scheduling of work orders based on Request Code.

The table contains the following fields:

Skill Level	XX
Description	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Skill Level	Description
AC	AC Tech
AM	AC Master Tech
EL	Electrician
EM	Electrical Master Tech

Call Types - Used to classify & organize your open work orders by the various services that you provide. This is required for each work order.

The table contains the following fields:

Call Type XXXXXX
Description XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Dispatcher ID XXX (optional, provides a default dispatcher on the work order)
Default Labor Code XXXXXXXXXX (optional, used as a default for labor entry)
Default Contract Type XX (used to link the appropriate contract based on call type)
Exclude From Search? YES/NO (optional, will exclude from ESC-Q search)
Transfer to history when complete? YES/NO (optional, used for in-house WO's that won't be invoiced)

Call Type	Description	Disp ID	DF Labor CD	*DF Contract TY	Exclude	Trf
A	AC Service	PRT	A/MASTER	M	NO	NO
AC	AC Service	PRT			NO	NO
AW	AC Warranty	PRT			NO	NO
E	Electrical Service	PRT			NO	NO
T	OSAS Training	FAE	T		NO	NO

Please refer to the contract section of this guide for setup information.

Labor Codes - These are required to track all labor performed on the work order. The system allows multiple labor codes on the same work order as well as labor from multiple employees.

The table contains the following fields:
Labor Code XXXXXXXXXX
Description XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
G/L Sales XXXXXXXXXXXX (used to track the revenue billed for this labor code)
Bill Rate 000000.00 (actual billing rate before any contract adjustment)
Internal Rate 000000.00 (not required, used for profitability reports)
Minimum Hours 000000.00 (automatic roundup, ex .25 = 1/4 hour minimum charge)
Estimate Hours 000000.00 (not required, used for preventative maintenance procedures)
Skill Level XX (not required, used for scheduling)
Tax Code 00 (used for sales tax calculation)
Quick Support Call Type XXXXXX (used with time clock entry for quick WO entry)
Allow Labor Credits? YES/NO (used for contracts, provides N/C labor)
Override Rate? YES/NO (allows changing the rate including contracts)

Labor Code	Description	G/L Sales	Bill Rate	Int Rate	Min Hrs	Est Hrs	Skill	Tax	Quick Call Type	Allow CR	Override Rate
A/MASTER	AC Master Technician	4010	150.00	35.00	.25	0.00	AM	00	A	YES	NO
AC TECH	AC Technical	4020	120.00	35.00	.25	0.00	AC	00	A	YES	NO
E/MASTER	Electrical	4030	125.00	35.00	.25	0.00	E	00		YES	NO
ELEC	Electrician	4040	150.00	35.00	.25	0.00	EM	00	N	NO	NO
TR	Travel Time	4050	45.00	35.00	.25	0.00		00		NO	NO
PM	Clean System	4060	0.00	35.00	1.0	1.00	PC	00	PM	NO	NO

Job/Project ID (optional)- This table is used to create projects. Many work orders can be assigned to the same project. Only the project assigned dispatcher can control the status of the work order, for example flagging the project as complete and ready to invoice.

The table contains the following fields:

Cust ID	XXXXXX
Project ID	XXXXXX
Project Desc	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Dispatcher ID	XXX (optional, sales rep ID of the project manager)

Customer ID	Project ID	Description	Dispatcher ID
ACE001	SERVER	Web Server / eBusiness Application	HWM
DAL001	OSAS	OSAS 6.12 GUI upgrade	SWM

Work Performed Codes (optional) - This is used for quick short cut data entry of labor tasks performed.

The table contains the following fields:

Call Type	XXXXXX
Prefix/Suffix	P/S
Code	XXX
Description	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Call Type	Prefix/Suffix	Code	Description
A	P	BAL	Replace Ballast
E	P	BAL	Replace Ballast
E	P	FIX	Repair Problem
E	P	LAM	Replace Lamps
H	P	I	Installed
H	S	P	Printer

For example: during labor entry you are prompted for a prefix and a suffix. If you entered "I" as the prefix and you entered "P" as the suffix the labor description would automatically default to "Installed Printer". You then can edit or type any additional text to describe the work performed.

Request Codes (optional) - This is used for scheduling work orders based on the type of service requested and the skill level.

The table contains the following fields:
Request Code XXXXXX
Description XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Skill Level XX

Request Code	Description	Skill Level
APROBL	AC Problem	AC
EPROB	Electrical Problem	EL

Priority Codes (optional) - Used to classify work orders by priority.

Priority Code XX
Description XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Priority Code	Description
00	Low
50	Normal
99	Urgent
L	Low
N	Normal
H	High

Zones (optional) - Used to assign the customer location to a general zone. The scheduling screen allows sort/selection based on zone.

The table contains the following fields:
Zone XXXXXX
Description XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Zone	Description
PA-1	South Philadelphia
PA-2	West Chester
NJ-1	South New Jersey
DE-1	DE Shore Area
DE-2	DE South Inland
DE-3	DE Central

Workorder User Setup – Used to setup user defaults. If you are using the user screen in Resource Manager, the user ID should match the user ID in RM, otherwise the user will be prompted to log in when initially entering workorder.

The table contains the following fields:

User ID	
User Name	
Sales Rep ID	(Required – Used for Taken By Default
Location	(Required – Location Default when entering Items)
Display Costs?	(Y/N – Determines whether the cost is displayed when entering Items)
Labor Code	(This will default when entering Labor if there is not a default labor code assigned to the call type)
Skill Level(s)	(Used for scheduling)
Printer Assignments:	
Workorder	(Default Printer for Workorder Forms. If “Quick” is on, the user will not be prompted for the printer unless it is not available)
Invoice	(Default Printer for an Online Invoice. If “Quick’ is on, the user will not be prompted for The printer)

Workorder Defaults – Used to setup Global Workorder defaults. This is located in File Maintenance.

Default New Call Status	Default status when entering a new workorder.
Default Contract Status	Default Contract Status when processing contracts. (Invoiced Status)
Contract Call Type	Used as a filter when searching history.
PM Call Type	Used as a filter when searching history.
Cash Receipt Batch	If batching is used, this is the batch that is used for Payments/Deposits.
Default P/O Batch	If P/O batching is used, the batch that is used when purchasing items.
Quote Status	This can be used to print a different form when printing the invoice.
Description Field Length	This is the length that is used when entering addl descriptions, comments, and Directions. Must be between 20 and 60. The default is 35. This should be determined based on the length on the Invoice forms.

Serial Number Length	The default is 35. RCG uses a 6 character nameplate.
Serial Number Padding	The defaults is L (Left Space Fill). The other options are Left Zero Fill, Right Space Fill and Right Zero Fill.
Ship-to ID Default	The default is “MAIN”. This is the main location for each customer. The default Record is created when entering a new customer.
Auto Assign Invoice No.	If this is set to YES, the invoice number is assigned to the workorder when it is entered. If you take payments/deposits, they will be posted to the open invoice file with the invoice no. otherwise it will default “ON ACCT” or “DEPOSIT”.
Use Temp Items	YES/NO – This is used for special orders and assigns a temp item no.
Temp Item Prefix	The default is “+”.
Temp Item Length	The default is 6. If you are using temp items, the system will create an item no Based on the prefix plus length. An example temp item number using the defaults would be +00001.
Post Labor Cost to A/R History	YES/NO – If yes, the internal rate in the labor code will be posted to A/R detail history in the cost field. It will not post to G/L. This can be used For profits when printing detail history.

Ship To Locations - New fields have been added to the standard OSAS file maintenance screen. These are optional fields and can be user defined. We have added some custom programming to validate some of the fields, below is a list of the ship to fields from our RCG version. After a ship-to ID is added, you can add additional comments and directions.

Contact	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Note:	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Phone No.	( ) -	
Fax No.	( ) -	
Travel Miles	0.00	
Travel Time Hrs	0.00	
Zone	XXXXXX	
Cell Phone	( ) -	(User Defined)
Unused 2	5 Char	
Unused 3	5 Char	
Unused 4	YES/NO	
Unused 5	YES/NO	
Unused 6	YES/NO	
Unused 7	YES/NO	
Unused 8	YES/NO	

Equipment Master – This is a new serial number file maintenance screen. You can enter new serialized items directly into the database using this screen. It also serves as a great lookup tool for purchase, sales and contract information. After an Item is enterered with a Cust ID and Site, you can access User Defined Fields and PM Items.

```
Serial No.          (The actual serial number used to track the item, RCG assigns our own tracking #)
Manuf. Serial #     (Comment field, RCG uses this to reference the MFG serial #)
Part No.              (Inventory Item Number)
--------------------------------------------------------------------------
Unit Cost                              [i]Cust ID             [ii]Contract ID
Unit Price                             [iii]Site No           [iv]Maint Charge
---------------------------------------------+------------------------------
Bought From                            | P.O. Number
Address 1                              | P.O. Date
Address 2                              | Date Received
Address 3                              | Invoice No.
City            St    Zip              | Invoice Date
Phone Number                           |
---------------------------------------------+------------------------------
Sold To                                | Customer P.O. #

Address 1                              | Order Date
Address 2                              | Date Shipped
Address 3                              | Invoice No.
City            St    Zip              | Invoice Date
Phone Number
 |
```

[i] This is the customer ID that is assigned the equipment, in the case of 3rd party leasing the Sold To could be different from the actual customer that is using the equipment.

[ii] This is the maintenance contract ID, refer to the contracts section for setup information.

[iii] This is the site id where the equipment is installed.

[iv] This is the amount to bill for maintenance. The billing frequency is stored in the contract file.

Contract Setup

Possibilities:	Contract per Cust ID
	Per Site
	Per System
	The PM's are scheduled based on the contract.
	The Inventory Items must be serialized and they can be generic – ex. TR3THP – TRANE 3 TON HEAT PUMP

RM User Defined Fields: These fields are used in the equipment master file. To setup the fields, go to Resource Manager / Data File Maintenance / User Defined Field Setup. Select AR for the App ID and WOSNx for the file.

Examples:
- Unit Size / String / 50
- Oil Filter / String / 25
- Nozzle Size / String / 25
- Brand / String / 35
- Model No. / String / 25

Contract Items – This is a where you can assign a default Maintenance Charge on Equipment.

Maint Charge	00000000.0000
Bill Frequency	X (Annual, Semi-annual, Quarterly, Weekly, Monthly)
Parts Item?	YES/NO (used for sorting on the Invoice)

Contract Types: Used to setup the different contract types. This is also used for recurring billing and

Contract Type	Examples are MW (Manufacture Warranty) and PM (Preventive Maintenance)
Descriptions	These are the descriptions about the contract type and will be copied to the workorder. This can be a list of instructions for PM's.
Revenue Labor Code	Labor Code with the G/L acct for the revenue.
Freq Disc lab. Code	Labor Code with the G/L acct for the discount.
Mult Disc Lab Code	Labor Code with the G/L acct for the discount.
Coverage Types:	Parts/Labor etc.

Add/Change Contracts:

Contract ID	This is the unique ID for the contract. Press enter to assign the next ID
Contract Type	
Cust ID	The customer ID where the equipment is located or where the service will be performed.
Bill To	The Customer ID who is going to be billed. The bill to will default to the customer ID.
Status	Enter Active, Pending, Cancelled, or Expired. Active and Pending will allow you to use This contract. Pending can be used and changed to active when the invoice is paid.
Addl Desc	Optional – this will be copied to the workorder.
Last Bill Date	Date the contract was billed.
Auto Renew	For recurring bills
Amount Billed	Amount last billed
Unearned Amt	Optional – Can print the unearned Contract revenue report.
Start Date	Date the contract starts
End Date	Date the contract ends. For recurring contracts, it is best to enter a long term date, Ex. 12/31/2100
Start Count	Optional
End Count	Optional
Bill Frequency	How often the contract will be billed (Recurring)
Eq Charge UOM	Conversion Factor based on how the contract item is setup.
Labor Amount	An additional amount to be billed.
Eq labor Amt.	Display Only
Equip Maint	Display Only – Calculated from the equipment that is assigned to this contract.
Freq Disc	Amount or percent of the discount. Enter discount as positive. This can be used If the customer chooses to pay annually instead of monthly.
Mult Disc	Amount or percent of the discount. Enter discount as positive. This can be used If the customer has a lot of items under contract.
Perform PM Every xx.xx Months	Enter the number of months between PM's. Leave blank if this is not A PM contract. Enter 6 months for 2 times/year. Enter .25 for weekly.
Next PM Due	Enter the date the next PM is due. This date is updated each time a PM is created.

After you save the information, you can enter custom rates for this contract that will override the contract type. Equipment can now be assigned to this contract. Enter "Q" and the equipment is displayed and you can append new items. Make sure to enter the Customer ID, Site ID, contract no. and maintenance charge if any.

PM Items - This is located in the equipment screen. After you select the equipment ID, you can enter "M" for PM Items.

Whse	
Item	Filters etc.
Desc	
Unit	
Qty	Qty needed for PM
Add to PM WO?	Enter YES to copy the items to the PM workorder.

Create Contract Billing Batch – This function creates the recurring bills.

Enter the Customer ID from/thru, Contract Types From/Thru, Created by, and Invoice Date.
The processing Date will default to the 1st day of the month based on the invoice date.
The processing date must be between the start and end date of the contract. The last bill date and the billing Frequency is compared to the processing date to determine whether the contract gets billed during this cycle.
Contracts must be flagged as Auto Renew and the status must be Active or Pending.

Edit Contract Bills – Use this function to change any contracts that were created. You can also delete If needed.

Print Invoices – Use this function to print invoices for the contracts that were just billed.

Print Journal – Use this function to print a sales journal.

Contract Daily Sales Tax Report – Optional

Post Contracts – Use this function to Post to G/L, Customer and Open Invoice File, and History.

Create PM Workorders – This function creates the workorders for PM's. They are created in the new Workorder batch in daily work .

Enter the customer ID from/thru, Contract Type from/thru, and created by.
The Due Date Thru will include all PM's with the next PM Due date equal or early than the date that is entered.
The next PM Due date will be recalculated by adding the month interval.
The contract status must be either active or pending. Auto Renew is not used for PM's.

Additional Notes:

Enter Calls:

Esc Q - Search Tool

Credits: Enter qty as negative, Cost/Price must be positive.