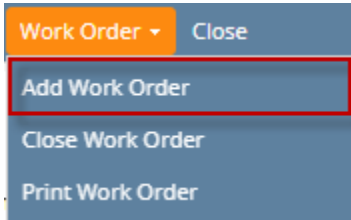


How to Add a Work Order

Here are the steps on how to create a work order.

1. [Open the Consumption Sites record.](#)
2. Click the **Work Order > Add Work Order** toolbar button. A new work order will be added in the grid under **Status: Open**.



3. Fill out the appropriate field on Work Order Details panel – **Category, Status, Performer, Date Scheduled**, and **Additional Info**. Refer to [Consumption Sites > Work Orders](#) tab for the field description.
4. [Add the To Do Items](#) of the work order, if there is any.
5. **Save** the changes in the Consumption Sites record. The **Work Order No** will be automatically generated and displayed on the field.

A screenshot of a web application window titled 'Consumption Sites - 0001005079'. The window has a menu bar with options like New, Save, Search, Undo, Attach Device, Site Action, Print Call Entry, Add Call Entry, Dispatch, Contract, Customer, Create Event, Summary List, Work Order, Print Efficiency, and Close. Below the menu bar is a form for customer information: Customer (Customer B), Address (111 Princeton Road, Fort Wayne, IN 46808), Phone (2000000000), Customer No (0001005079), Terms (Net 30), Regular Credit (0.00), Credit Limit (0.00), Current (0.00), Total Past Due (0.00), Budget Amt Due (0.00), and Prepaid Balance (0.00). Below this is a tabbed interface. The 'Work Orders' tab is selected. It shows a table with columns: Status, Work Order No., Close Reason, Date Scheduled, Date Closed, Entered By, and Date Created. There is one row with Status 'Open', Work Order No. '4', Date Scheduled '04/20/2016', Entered By 'irelyadmin', and Date Created '04/25/2016'. Below the table is a 'Details' section with 'To Do Items' (SET TANK, LABOR) and 'Work Order Details' (Work Order No: 4, Category: Cat 1, Status: Open, Date Scheduled: 04/20/2016, Performer: Customer C, Additional Info: sample work order, Entered By: irelyadmin, Date Created: 04/25/2016, Date Closed, Close Reason, Comments). The bottom status bar shows 'Page 1 of 1'.

6. **Work Orders** tab will display the number of open orders.

A screenshot of the 'Work Orders' tab in the web application. It shows a tabbed interface with 'Work Orders(1)' highlighted with a red rectangular box. Other tabs include Site, Detail, Devices, Associated Sites, Appliances, Order, Deliveries, Events, Attachment, and Audit Log. Below the tabs is a 'Filter (F3)' button.

Here are the steps on how to create a work order.

1. [Open the Consumption Sites record.](#)
2. Click the **Work Order > Add Work Order** toolbar button. A new work order will be added in the grid under **Status: Open**.

A screenshot of the 'Consumption Sites - 0001005079' record, similar to the one above. The 'Work Order' button in the menu bar is highlighted with a red rectangular box. A dropdown menu is open, showing three options: 'Add Work Order', 'Close Work Order', and 'Print Work Order'.

3. Fill out the appropriate field on Work Order Details panel – **Category, Status, Performer, Date Scheduled**, and **Additional Info**. Refer to [Consumption Sites > Work Orders](#) tab for the field description.
4. [Add the To Do Items](#) of the work order, if there is any.

5. **Save** the changes in the Consumption Sites record. The **Work Order No** will be generated and displayed on its respective field.

Consumption Sites - 0001005079

New Save Search Undo Attach Device Site Action Print Call Entry Add Call Entry Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency Close

Customer: Customer B Customer No: 0001005079 Current: 0.00 Credit Note: 0.00
 Address: 111 Princeton Road Fort Wayne, IN 46808 Terms: Net 30 Total Past Due: 0.00
 Regular Credit: 0.00 Budget Amt Due: 0.00
 Phone: 2000000000 Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Attachment (0) Audit Log (16)

Layout Filter Records (F3)

Status: Open Work Order No. 4 Close Reason Date Scheduled: 04/20/2016 Date Closed Entered By: irelyadmin Date Created: 04/25/2016

Details Attachment (0)

To Do Items: SET TANK, LABOR

Work Order Details: Work Order No: 4 Category: Cat 1 Status: Open Date Scheduled: 04/20/2016 Performer: Customer C Additional Info: sample work order Entered By: irelyadmin Date Created: 04/25/2016 Date Closed: Close Reason Comments:

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Here are the steps on how to create a work order.

1. Open the Consumption Sites record.
2. Click the **Work Order > Add Work Order** toolbar button. A new work order will be added in the grid under **Status: Open**.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry + Call Entry Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency Close

Customer: Customer A Customer No: 0001005078 Current: 0.00 Credit Note: Add Work Order
 Address: 1234 Main St Fort Wayne, IN 46801 Terms: Due on Receipt Total Past Due: 0.00
 Regular Credit: 0.00 Budget Amt Due: 0.00
 Phone: 1000000000 Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 2 Consumption...

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Audit Log (45)

Layout Filter Records (F3)

Status: Open Work Order No. 6 Close Reason Date Scheduled: 02/10/2016 Date Closed Entered By: irelyadmin Date Created: 02/08/2016

To Do Items: SET TANK, LABOR

Work Order Details: Work Order No: 6 Category: Cat 1 Status: Open Date Scheduled: 02/10/2016 Performer: Customer C Additional Info: This is a sample work order Entered By: irelyadmin Date Created: 02/08/2016 Date Closed: Close Reason Comments:

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3. Fill out the appropriate field on Work Order Details panel – **Category**, **Status**, **Performer**, **Date Scheduled**, and **Additional Info**. Refer to [Consumption Sites > Work Orders](#) tab for the field description.
4. Add the **To Do Items** of the work order, if there is any.
5. **Save** the changes in the Consumption Sites record. The **Work Order No** will be generated and displayed on its respective field.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry + Call Entry Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency Close

Customer: Customer A Customer No: 0001005078 Current: 0.00 Credit Note: Add Work Order
 Address: 1234 Main St Fort Wayne, IN 46801 Terms: Due on Receipt Total Past Due: 0.00
 Regular Credit: 0.00 Budget Amt Due: 0.00
 Phone: 1000000000 Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 2 Consumption...

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Audit Log (45)

Layout Filter Records (F3)

Status: Open Work Order No. 6 Close Reason Date Scheduled: 02/10/2016 Date Closed Entered By: irelyadmin Date Created: 02/08/2016

To Do Items: SET TANK, LABOR

Work Order Details: Work Order No: 6 Category: Cat 1 Status: Open Date Scheduled: 02/10/2016 Performer: Customer C Additional Info: This is a sample work order Entered By: irelyadmin Date Created: 02/08/2016 Date Closed: Close Reason Comments:

Page 1 of 1

Here are the steps on how to create a work order.

1. Open the Consumption Sites record.

- Click the **Work Order > Add Work Order** toolbar button. A new work order will be added in the grid under **Status: Open**.

Consumption Sites - 0000000023

Customer: UNI OIL Customer No: 0000000023 Current: 0.0
 Address: CASH CUSTOMER CHISAGO CITY, 55013 Terms: 20 - COD Total Past Due: 0.0
 Phone: 2600000000 Regular Credit: 0.000000 Budget Amt Due: 0.0
 Credit Limit: 1.000000 Prepaid Balance: 0.0

Showing 3 Consumption Site

Filter Records (F3)

Layout Filter Records (F3)

Work Order

Add Work Order

Close Work Order

Print Work Order

- Fill out the appropriate field on Work Order Details panel – **Status**, **Performer**, **Date Scheduled**, and **Additional Info**. Refer to [Consumption Sites > Work Orders](#) tab for the field description.
- Add the **To Do Items** of the work order, if there is any.
- Save the changes in the Consumption Sites record. The **Work Order No** will be generated and displayed on its respective field.

Consumption Sites - 0000000023

Customer: UNI OIL Customer No: 0000000023 Current: 0.000000 Credit Note:
 Address: CASH CUSTOMER CHISAGO CITY, 55013 Terms: 20 - COD Total Past Due: 0.000000
 Phone: 2600000000 Regular Credit: 0.000000 Budget Amt Due: 0.000000
 Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site

Filter Records (F3)

Layout Filter Records (F3)

Work Orders

Status	Work Order No.	Close Reason	Date Scheduled	Date Closed	Entered By	Date Created
Status: Open						
Open	11677		06/23/2015		AGADMIN	06/23/2015

To Do Items

View Remove

Completed

SET TANK

LABOR

Work Order Details

Work Order No: 11677 Status: Open

Date Scheduled: 06/23/2015 Performer: Company

Additional Info: this is a sample work order

Entered By: AGADMIN Date Created: 06/23/2015

Date Closed: Close Reason:

Comments:

Page 1 of 1

Here are the steps on how to create a work order.

- Open the [Consumption Sites](#) record.
- Click the **Work Order > Add Work Order** toolbar button. A new work order will be added in the grid under **Status: Open**.

Consumption Sites - 0000000010

Customer: UNIOIL PETROLEUM Customer No: 0000000010 Current: 0.00
 Address: MAIN STREET CAMBRIDGE, MN 55008 Terms: 20 - COD Total Past Due: 0.00
 Phone: 1000000000 Regular Credit: 0.00 Budget Amt Due: 0.00
 Credit Limit: 1.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Filter

Location Information

Site Information

Work Order

Add Work Order

Close Work Order

Print Work Order

- Fill out the appropriate field on Work Order Details panel – **Status**, **Performer**, **Date Scheduled**, and **Additional Info**. Refer to [Consumption Sites > Work Orders](#) tab for the field description.
- Add the **To Do Items** of the work order, if there is any.

5. **Save** the changes in the Consumption Sites record. The **Work Order No** will be generated and displayed on its respective field.

Consumption Sites - 0000000010

New Save Search Undo Attach Device Site Action Print Call Entry Call Entry Dispatch Contract Create Event Summary List Work Order Print Efficiency Close

Customer: UNIOIL PETROLEUM Customer No: 0000000010 Current: 0.00 Credit Note:
Address: MAIN STREET CAMBRIDGE, MN 55008 Terms: 20 - COD Total Past Due: 0.00
Regular Credit: 0.00 Budget Amt Due: 0.00
Phone: 1000000000 Credit Limit: 1.00 Prepaid Balance: 0.00

Showing 1 Consumption Site << Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History **Work Orders**

Filter:

Status	Work Order No.	Close Reason	Date Scheduled	Date Closed	Entered By	Date Created
Status: Open						
Open	11676		03/12/2015		AGADMIN	03/12/2015

To Do Items

Edit Remove

Items Completed

PICK UP TANK ☐

SET TANK ☐

Work Order Details

Work Order No: 11676 Status: Open

Date Scheduled: 03/12/2015 Performer: Company

Additional Info: This is a sample work order

Entered By: AGADMIN Date Created: 03/12/2015

Date Closed: Close Reason:

Comments: