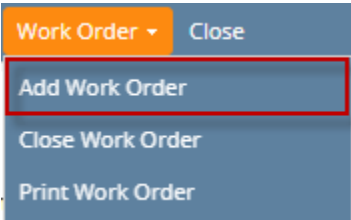


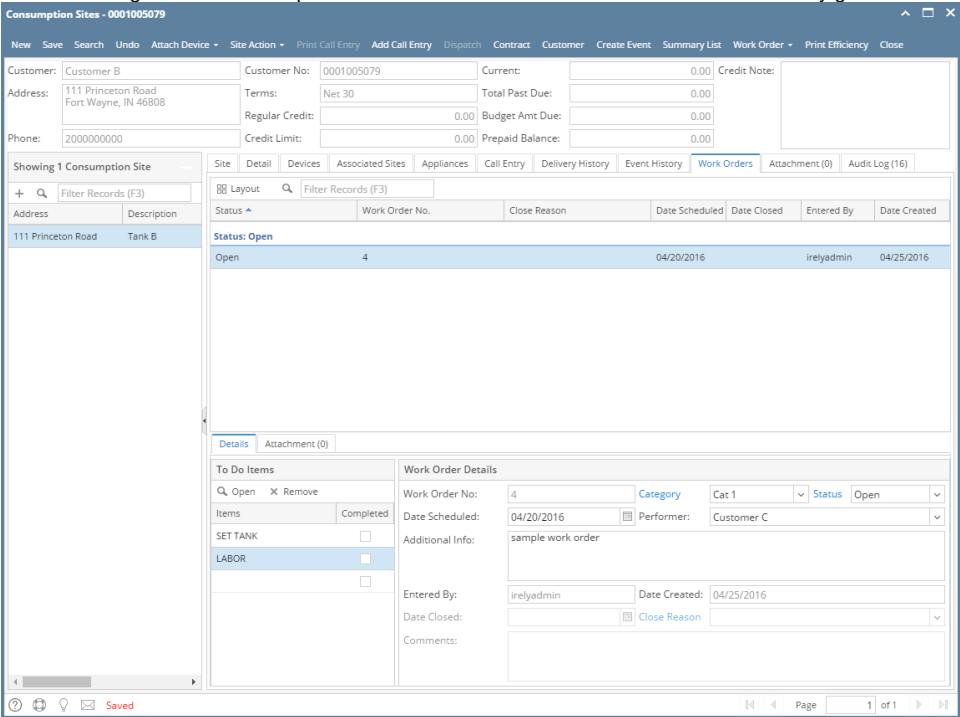
# How to Add a Work Order

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

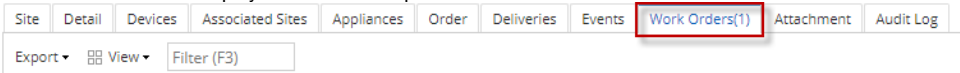
- 1. Open the Consumption Sites record.
- 2. Click the **Work Order > Add Work Order** toolbar button. A new work order will be added in the grid under **Status: Open**.



- 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.

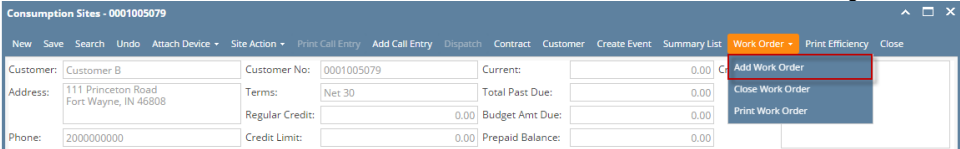


- 6. **Work Orders** tab will display the number of open orders.



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 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

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:

Page 1 of 1

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:

Page 1 of 1

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

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event

Layout Filter Records (F3)

Work Order Print Efficiency Close

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

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders

Layout Filter Records (F3)

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

To Do Items

View Remove

Items 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

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History

Filter: Location Information Site Information

Work Order Print Efficiency Close

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

Address: MAIN STREET  
CAMBRIDGE, MN 55008

Phone: 1000000000

Customer No: 0000000010

Terms: 20 - COD

Regular Credit: 0.00

Credit Limit: 1.00

Current: 0.00

Total Past Due: 0.00

Budget Amt Due: 0.00

Prepaid Balance: 0.00

Credit Note:

Showing 1 Consumption Site

Filter:

MAIN STREET

Sample Site

Status

Work Order No.

Close Reason

Date Scheduled

Date Closed

Entered By

Date Created

Status: Open

Open1167603/12/2015AGADMIN03/12/2015

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: