

2014

ProTrac Work Orders

Shop Repair or Repair done by an outside service are 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 3rd 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.
4/1/2014



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 Gravel Truck that is in need of a new clutch.

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

This can be mandatory or not depending on your operation.

PRO-POS Part 2
 POS Part 2 PRO ProTrac(R) 8.22.04 MDC pos0009

Acct No: A1MOB2 Phone: (913)677-3993 Order No: 5702 Order Type: W
 Name: A-1 MOBILE REPAIR Ship Name: A-1 MOBILE MAINTENANCE

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
SPS	GRAVEL TRUCK WITH	CLUTCH PROBLEMS	W	1	0.0000	0.00	0.00	N

The first line on a work order is free form - Often the drill - Truck - or other repair item is not even on your system. With ProTrac you just key in what you know to start the process. As soon as the first line is keyed ProTrac asks for a serial number. This can be mandatory or not.

Question

Record serial number(s)?

Line: 1 Of: 1 Sub Tot: 0.00 T

Desc:

List: 0.00 Notes: N

Stocked: No

CM%: 0.00

TAB/BACK-TAB=Navigate, RETURN=Complete Line, F8=Item Browse

Enter data or press ESC to end.

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 Name: A-1 MOBILE REPAIR Ship Name: A-1 MOBILE MAINTENANCE

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
SPS	GRAVEL TRUCK WITH	CLUTCH PROBLEMS	W	1	0.0000	0.00	0.00	N

Serial Number

Item Number: SPS GRAVEL TRUCK WITH

Order No: 5702 Line No: 1

Contact: JANET CARLSON Phone: (913)677-3993

Enter/Select Serial Numbers		
Seq#	Serial Number	Receipt Number
1	BLR968541125468246254782515412	3333333

As soon as the 1st line of the work order was keyed ProTrac asks for a Serial number (31 Alpha Numeric Characters)

Receipt number can be a Tag Number from the hard copy work ticket - it has 16 Alpha Numeric Characters

Line: 1 Of: 1

Desc:

List: 0.00

Stocked: No

CM%: 0.00

TAB/BACK-TAB=Navigate

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

If you use tags 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 select the Note button and this screen will be displayed. This note has 4 lines of 30 that will print on the Work Order and the Invoice.

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Name: A-1 MOBILE REPAIR Ship Name: A-1 MOBILE MAINTENANCE

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
SPS	GRAVEL TRUCK WITH	CLUTCH PROBLEMS	W	1	0.00	0.00	0.00	N

After keying in the line notes can be attached to the line - hit the note key and this screen is displayed - this is a 180 character Note feature.

Line: 1 Of: 1

Desc: CLUTCH PROBLEMS

List: 0.00 Notes: N

POS/OE Line Notes det.... X

Item #: SPS GRAVEL TRUCK WITH

Notes:

The Clutch is really slipping on this truck

This unit has overdrive

Part of a 180 Character Note field that prints on the Work Order and the invoice

Save Cancel

CM%: 0.00

Sort Cancel Back Finish

F2=Finish Order Options, ESC=Exit & Finish Later

Enter the line note or ? for standard notes.

This Work Order is tacked to the bulletin board in the shop. The mechanic would start a hard copy Work Order that will be given to someone to key in the parts and labor that have been used for this repair. If a job in the shop for 3 days, each day the ticket is updated until it is ready for billing.

DATE: 04/10/2014 TIME: 13:22:30

ACCT NO: A1MOB2 TERMS: 2*10 NET30

SLS ID/REP: MDC / JON JOB:

PO NUM:

SHIP VIA: Delivery TAX EXEMPT#: 658-96

PAGE: 1

ORDER: 5702

SOLD TO:

A-1 MOBILE REPAIR

5441 HERRIAM DR.

Shawnee Mission, KS 66203

SHIP TO:

A-1 MOBILE MAINTENANCE

5441 HERRIAM DR.

MERRIAM, KS 66203

JANET CARLSON

PH: (913)677-3993 W O R K

FAX: (913)677-9087 O R D E R

PL	ITEM NUMBER	DESCRIPTION	ORDER	SHIP	B/O	YOUR PRICE	EXT AMOUNT
SPS	GRAVEL TRUCK WITH	CLUTCH PROBLEMS	1			0.00	0.00N

The Clutch is really slipping on this truck

This unit has overdrive

Part of a 180 Character Note field that prints on the Work Order and the invoice

S#: BLR968541125468246254782515412 R#: 3333333

** Spec Inst: DELIVER TO JACK OR TED

ENSURE THAT ALL PARTS AND LABOR HOURS ARE GIVEN TO MARY IN ACCOUNTING BEFORE 4PM EACH DAY

Serial Number / Number that is associated with this truck. We can make this mandatory or not

WEIGHT: .00 TAXABLE: .00 SUB TOTAL: .00

TENDER: .00 CA NON-TAX: TAX: .00

CHANGE: .00 LABOR: .00 Delivery

RECEIVED BY

8 TST PRO

INV TOTAL:

PRO-POS Order Browse

POS Order Browse PRO ProTrac(R) 8.22.04 MDC pos1003

Search:

RequiredDate	Order#	Account#	Sta	SlID	Rep	ShipTo Name	Order Date	Invoice#	InvoiceDate	Order
04/10/2014	5702	A1MOB2	0	MDC	JON	A-1 MOBILE MAINTENANCE	04/10/2014			

It is the end of the day and your mechanic has given the hard copy work order to someone to key in the parts and hours used for this truck today. When there are 20 jobs working then the accounting person can search by the Required Date, Work Order #, Acct #, Sales ID, Ship Name, Job #, or Customer PO.

When the Work Order is selected the next screen would display and Parts and Labor can be keyed.

Order Type:
 POS Quote Transfer Work Order

Order Status:
 All Open Ordered BackOrd Hold All Invoiced

Sort/Srch By:
 Req Date Order# Acct# SalesID Ship Name Job# CustPO

F5/Srch Exit

ESC=Exit

Press the F12 key to export the order data to Excel.

When the mechanic gives the work order hard copy to accounting to key in today's charges they would go into Order Browse and Select Work Orders. When they select the WO the next screen would display.

Accounting has keyed in today's charges for both parts and labor. The Labor can have a labor rate for each individual mechanic already loaded in the system. It would be just like an inventory item.

If Management varies the Labor rate, you can also assign a labor rate for this WO.

Everyone does this a little differently so we give you options.

PRO-POS Part 2

POS Part 2 PRO ProTrac(R) 8.22.04 MDC pos0009

Acct No: A1MOB2 Phone: (913)677-3993 Order No: 5702 Order Type: W

Name: A-1 MOBILE REPAIR Ship Name: A-1 MOBILE MAINTENANCE

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
SPS	GRAVEL TRUCK WITH	CLUTCH PROBLEMS	W	1	0.00	0.00	0.00	N
BWM	HDRK4L6006LS	LS SERIES 4L HD REBUILD P	S	1	421.32	0.00	421.32	N
LAB	LABOR CHARGE	Hourly Service Charge	S	4	75.00	0.00	300.00	N
**		Comment	N	0	0.00	0.00	0.00	N
BWW	WIL 15E-6083K	BRAKE PADS,(4PK) DYNALIT	S	4	41.42	0.00	165.68	N
LAB	LABOR CHARGE	Hourly Service Charge	S	3	75.00	0.00	225.00	N
			S	1	0.00	0.00	0.00	N

Line: 7 Of: 7 Sub Tot: 1,112.00 Tax: 0.00 Total: 1,118.50

Desc: Wght: 0.00

List: 0.00 Notes: Y

This is the Work Order after adding parts and labor for a Clutch Pack. When service called for approval they sold them on replacing brake pads. This Work Order could go on for many lines. At this time we will close it and invoice it to the customer.

CM%: 53.12

Back Finish

TAB/BACK-TAB=Navigate, F8=Item Browse, F12=Catalog, ?=Options

Enter P/L or '**', enter comments. Enter=Process,F2/Esc=Cancel

When a mechanic is given a WO they would fill out this information about the job. If they are not available to talk with a customer, a clerical person can bring up this display to give the customer a status on their tool, truck, or machine that is being repaired.

Order Info wo0001

Order Information

Tech: John Postelwaite

Bin Loc: Bay 5

Status: Parts have just arrived and I am trying to finish it up today

Date: 04/10/2014

Save Cancel

The mechanic needs to keep updating the Work Order information so that anyone can answer the customers question.

Enter the status of items on the order.

PRO-POS Part 2

POS Part 2 PRO ProTrac(R) 8.22.04 MDC pos0009

Acct No: A1MOB2 Phone: (913)677-3993 Order No: 5702 Order Type: W

Name: A-1 MOBILE REPAIR Ship Name: A-1 MOBILE MAINTENANCE

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
SPS	GRAVEL TRUCK WITH	CLUTCH PROBLEMS	W	1	0.00	0.00	0.00	N
BWM	HDRK4L6006LS	LS SERIES 4L HD REBUILD P	S	1	421.32	0.00	421.32	N
LAB	LABOR CHARGE	Hourly Service Charge	S	4	75.00	0.00	300.00	N
**		Comment	N	0	0.00	0.00	0.00	N
BWW	WIL 15E-6083K	BRAKE PADS,(4PK) DYNALIT	S	4	41.42	0.00	165.68	N
LAB	LABOR CHARGE	Hourly Service Charge	S	3	75.00	0.00	225.00	N

Finish Order Options

W/O Print Order Ack RMA Pick/Pack DlvTkt **Invoice** Hold Ensh Ltr Cancel

Total: 1,118.50
Wght: 0.00

CM%: 53.12

Sort Cancel Back Finish

F2=Finish Order Options, ESC=Exit & Finish Later

If the last of the work has been posted all accounting has to do is to touch the invoice key and the Work Order would become an invoice that can be faxed, Emailed, or printed and mailed



Professional Data Systems, Inc
 664 SE Bayberry Lane, Suite 105
 Lee's Summit, MO 64063
 Phone: (816) 554-3010
 Fax: (816) 554-3130
 www.pdsi.com

Invoice Date	Invoice No
04/10/2014	2935
Time	Order No
4:32 PM	5702
Acct No	Page
A1MOB2	1

Sold To		Ship To	
A-1 MOBILE REPAIR 5441 MERRIAM DR. Shawnee Mission, KS 66203		A-1 MOBILE MAINTENANCE 5441 MERRIAM DR. MERRIAM, KS 66203	

Contact	Phone	Terms Code	Customer P.O.	SisID
JANET CARLSON	(913)677-3993	2%10 NET30	96854	MDC

Special Instructions	Ship Via	Tax Exempt No	SisRep
DELIVER TO JACK OR TED	Delivery	658-96	JON

P/L	Item Number	Description	Quantity Ordered	Quantity B/O	Quantity Shipped	Sell Price	Ext Price	T
SPS	GRAVEL TRUCK WITH S/N: BLR968541125468246254782515412	CLUTCH PROBLEMS The Clutch is really slipping on this truck This unit has overdrive Part of a 180 Character Note field that prints on the Work Order and the invoice	1	0	0	0.00	0.00	N
BWM	HDRK4L600ELS	LS SERIES 4L HD REBUILD KIT	1	0	1	421.32	421.32	N
LAB	LABOR CHARGE	Hourly Service Charge	4	0	4	75.00	300.00	N
BWW	WL 15E-6083K	CLUTCH AND SOLD FRONT BRAKES	4	0	4	41.42	165.68	N
LAB	LABOR CHARGE	BRAKE PADS,(4PK) DYNALITE SING Hourly Service Charge	3	0	3	75.00	225.00	N
DELIVER TO JACK OR TED ENSURE THAT ALL PARTS AND LABOR HOURS ARE GIVEN TO MARY IN ACCOUNTING BEFORE 4PM EACH DAY								

This invoice was emailed directly out of ProTrac as an Electronic Form. It could have been Faxed or printed and mailed

Non-Tax Total:	1118.50	Sub Total:	1112.00
Taxable Total:	0.00	Misc Charges:	0.00
		Discount:	0.00
		Tax:	0.00
		Freight:	6.50
		Invoice Total:	1118.50

X _____
 Received By
 Thank You

Work Order information

WorkOrder Info wo0001

Work Order Information

Tech: Mel's Repair Service

Bin Loc: 4715 Kedzie

Status: Sent for repairs on 03/30/2010

Date: 03/30/2010

Save Can

When it is decided where this unit will be sent then you would fill out the Work Order Information with the Company and address. Includes the date it was sent out to be repaired.

Enter the work order status.

Repair work that is sent out to a 3rd 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 needs to be updated if a repair is going to take longer at Matt's Repair Service.

Matt's Repair Invoiced for \$75.00

Special Costs cat...

Part Number: ZZZ REPAIR

Each Pricing

SPO ListPrice: 125.65

SPO SellPrice: 125.65

SPO Cost: 75.0000

SPO CoreCost:

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.

```

BANNISTER AUTO PARTS          DATE: 03/30/2010      TIME: 16:21:03
1107 E. BANNISTER ROAD        ACCT NO: A4THAN2     TERMS: Due on 10ch
KANSAS CITY, MO 64131         SLS ID: MDC          SLS REP: JON
                                PO NUM:
                                SHIP VIA: Customer Pickup
Phone: (816)941-8887 Fax:      TAX EXEMPTS: 89765
BILLED AT LEES SUMMIT, MO LOCATION BAP    PAGE: 1
                                ORDER: 4590
                                INVOICE: 2449

SOLE TO:                       SHIP TO:
A&T MANUFACTURING             A&T MANUFACTURING
7609 TROOST                   7609 TROOST
KANSAS CITY MO 64131         Kansas City MO 64131

Mary McDonald                  PH: (816)444-3931
                                FAX: (816)343-3955  I N V O I C E

PL  ITEM NUMBER      DESCRIPTION              *---QUANTITY---*
                                ORDER SHIP  B/O          YOUR   EXT
                                ORDER SHIP  B/O          PRICE  AMOUNT
-----
ABC PUMP              100 Gallons Per Secon    1
SE: AYM 695658                                RS: 36524
ZZZ REPAIR            REPAIR                    1      1
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.
WEIGHT: .00    TAXABLE: .00    SUB TOTAL: 125.65
TENDER: .00 CH NON-TAX: 126.28
CHANGE: .00    LABOR: .00      TAX: .00
RECEIVED BY
8 TST TST      FUEL SUBCHG: .63    Delivery .00
                                INV TOTAL: 126.28
    
```

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.