

2015

# 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 keyed the Question comes up about recording Serial Numbers (31 Alpha Numeric numbers). **(Next Page)**

**PRO-Order Lookup**

Order Lookup      PRO      ProTrac(R) 8.23.02      MDC      oe0005

Account#: 32ND01      32ND ST. CONSTRUCTION      Order#: 6096

Ship To: 1      32nd St. Construction      Taken By: M97

Contact: PAT ELMER      OrdType: W      Ord Date: 05/20/2015

Phone: (602) 876-5543      OrdClass: CS      OrdStat: O      Company: ARZ

PO No:      Category:

P/L	Item Number	Description	T	Qty	SellPrice	/	CoreSell	Extended	T
QUY	MOD 325	Leaking oil	W	1	0.00		0.00	0.00	N
**		Comment	N	0	0.00		0.00	0.00	N
**		Comment	N	0	0.00		0.00	0.00	N

Sub-Total: 0.00      Tax: 0.00      Total: 0.00

Quincy Model 325 Compressor that has an oil leak. You do not have to have the product in your inventory as the first line of the Work Order is Free Style.

**Serial Number**

Item Number: QUY      QUINCY MODEL 325

Order No: 6120      Line No: 1

Contact: PAT ELMER      Phone: (602)876-5543

Enter/Select Serial Numbers		
Seq#	Serial Number	Receipt Number
1	968574	

As soon as the line is keyed before you exit the first line of the Work Order - ProTrac asks if you want to key the Serial Number. If you do then this screen will be displayed and you key in the units serial number

OK      Exit

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.

**PRO-POS Part 2**

POS Part 2      PRO      ProTrac(R) 8.23.02      MDC      pos0009

Acct No: 32ND01    Phone: (602)876-5543    Order No: 6120    Order Type: W

Name: 32ND ST. CONSTRUCTION    Ship Name: 32nd St. Construction

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
QUY	QUINCY MODEL 325	LEAKING OIL	W	1	0.00	0.00	0.00	N
**			S	1	0.00	0.00	0.00	N

TWO ASTERISKS INDICATE A COMMENT LINE AND YOU CAN PUT ON AS MANY COMMENT LINES AS ARE NEEDED THE COMMENTS ARE PRINTED ON THE WORK ORDER AND THE INVOICE.

Line: 2    Of: 2    Sub Total: 0.00    Tax: 0.00    Total: 0.00

Desc: **Comments**

List: Comments: THIS IS AN OLDER UNIT THAT IS LEAKING AND BURNING OILA

0.00

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

Enter comments for this line item or ? for standard comments.

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 IS NOW IN PROTRAC  
**ANYONE CAN KEY IN THE PARTS AND LABOR TIME THAT IS ASSOCIATED WITH THE REPAIR. OR THEY CAN CHECK THE STATUS OF THE WORK ORDER.**

DATE: 06/03/2015      TIME: 13:53:40  
 ACCT NO: 32ND01      TERMS: 2\*10 NET30  
 SLS ID/REP: MDC / SUE      JOB:  
 PO NUM:  
 SHIP VIA: Customer Pickup  
 TAX EXEMPT#: 698543  
 PAGE: 1  
 ORDER: 6120

SOLD TO:  
 32ND ST. CONSTRUCTION  
 29012 N. 32ND ST.  
 PO BOX 1827  
 SUITE 1625  
 PHOENIX, AZ 85056  
 USA  
 PAT ELMER

SHIP TO:  
 32nd St. Construction  
 29012 N. 32ND ST.  
 PHOENIX, AZ 85053

PH: (602)876-5543    W O R K  
 FAX: (602)485-5654    O R D E R

PL	ITEM NUMBER	DESCRIPTION	*-----QUANTITY----			YOUR	EXT
			ORDER	SHIP	B/O		
QUY	QUINCY MODEL 325	LEAKING OIL		1		0.00	0.00N
		S#: 968574					
		THIS IS AN OLDER UNIT THAT IS LEAKING AND BURNING OILA					
		YOU CAN PUT IN AS MANY COMMENT LINES AS ARE NEEDED					
		ENSURE THAT ALL PARTS AND LABOR HOURS ARE GIVEN TO MARY IN					
		ACCOUNTING BEFORE 4PM EACH DAY					

SERIAL NUMBER IS NOW PERMANENTLY ATTACHED TO THIS COMPRESSOR

YOU WILL BE ABLE TO FIND THIS UNIT WITH ITS SERIAL NUMBER FROM NOW ON

WEIGHT: .00    TAXABLE: .00  
 TENDER: .00 CA    NON-TAX: .00  
 CHANGE: .00    LABOR: .00

SUB TOTAL: .00  
 TAX: .00  
 Delivery: .00  
 INV TOTAL: .00

RECEIVED BY  
 S TST    PRO

**Order Info** wo0001

Order Information

Tech: Mel Carney

Bin Loc:

Status: This is an older Quincy unit and is in need of TLC. It is leaking oil and starting to smoke.

This order information would be where the mechanic lets everyone know that parts have been ordered or they will be done tomorrow morning.

Each day your mechanic can log onto this info file and update the information. Then when the customer calls, anyone can open up this information page and let the customer know what is going on with their repair.

Date: 06/03/2015

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.

**PRO-POS Part 2**

POS Part 2 PRO ProTrac(R) 8.23.02 M97 pos0009

Acct No: 32ND01 Phone: (602)876-5543 Order No: 6120 Order Type: W

Name: 32ND ST. CONSTRUCTION Ship Name: 32nd St. Construction

P/L	Item Number	Description	T	Qty	SellPrice /	CoreSell	Extended	T
QUY	QUINCY MODEL 325	LEAKING OIL	W	1	0.00	0.00	0.00	N
**		Comment	N	0	0.00	0.00	0.00	N
**		Comment	N	0	0.00	0.00	0.00	N
QUY	2013402000	SEPARATOR,A/F,2-STAGE, 23	S	1	146.59	0.00	146.59	N
QUP	110589X002	AY,CON-ROD (HP)	S	1	479.58	0.00	479.58	N
QUP	0650010006	AIRNET FLANGE GASKET 10	S	1	35.23	0.00	35.23	N
SPN	OIL-TOOL-T	Summer Tool Oil	S	5	4.58	0.00	22.90	N
LAB	LABOR CHARGE	Hourly Service Charge	S	6	70.00	0.00	420.00	N
LAB	TRAVEL MILES	PORT TO PORT TRAVEL	S	75	0.75	0.00	56.25	N

Line: 9 Of: 9 Sub Tot: 1,160.55 Tax: 0.00 Total: 1,160.55

Desc: PORT TO PORT TRAVEL Wght: 0.00

List: 0.75 Notes: N

CM%: 46.09

Sort Cancel Back Finish

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

At the end of the work day the mechanic or someone in accounting would key in the parts labor and miles traveled onto the work order. The Work Order can be left alone and more parts and labor added tomorrow or you can invoice

PRO-POS Order Browse

POS Order Browse    PRO    ProTrac(R) 8.23.02    M97    pos1003

Search:

RequiredDate	Order#	Account#	Sta	SlsID	Rep	ShipTo Name	Order Date	Invoice#	InvoiceDate	Order
06/03/2015	6120	32ND01	0	MDC	SVE	32nd St. Construction	06/03/2015			1.
05/29/2015	6119	FM01	B	MDC		FM	05/29/2015			
05/29/2015	6114	FM01	0	MDC		FM	05/29/2015			
05/28/2015	6111	14THST01	0	MDC	BUD	14TH STREET	05/28/2015			
05/20/2015	6096	32ND01	0	M97	SVE	32nd St. Construction	05/20/2015			
12/12/2014	5907	14THST01	0	MEL	BUD	14TH STREET	12/12/2014			
11/18/2014	5869	14THST01	0	MDC	BUD	14TH STREET	11/18/2014			
10/01/2014	5833	FM01	0	MEL		FM	10/01/2014			

This is the list of Open Work Orders that are being worked on currently. Accounting can complete right from the last screen of the Work Order Or they can go to the Work Order screen Identify the customer and display the work order.

At that time they can add more items or simply invoice the Work Order.

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

  

ESC=Exit

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

Output Options
df1tp2

Available Printers:

Print                                     View  
 Fax     EMail

To E-Mail:

From E-Mail:

From Name:

Subject:

When Accounting Invoices this screen will appear. How the customer wants to get their invoice has already been preselected. In this case they want the invoice to be emailed.

If the customer is standing there and wants a printed copy, give them one and still email the invoice to their Accounts Payable department. You can also fax with Fax Software.



**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**

Invoice Date	Invoice No
06/03/2015	<b>3155</b>
Time	Order No
2:29 PM	6120
Acct No	Page
32ND01	1

Sold To		Ship To	
32ND ST. CONSTRUCTION 29012 N. 32ND ST. PO BOX 1827 SUITE 1825 PHOENIX, AZ 85056 USA		32nd St. Construction 29012 N. 32ND ST. PHOENIX, AZ 85053	

Contact	Phone	Terms Code	Customer P.O.	Sls/D
PAT ELMER	(602) 676-5543	2%10 NET30	96854	MDC

Special Instructions	Ship Via	Tax Exempt No	SlsRep
	Customer Pickup	696543	SUE

P/L	Item Number	Description	Quantity Ordered	Quantity B/O	Quantity Shipped	Sell Price	Ext Price	T
QUY	QUINCY MODEL 325 S/N: 968574 THIS IS AN OLDER UNIT THAT IS LEAKING AND BURNING OIL YOU CAN PUT IN AS MANY COMMENT LINES AS ARE NEEDED	LEAKING OIL	1	0	0	0.00	0.00	N
QUY	2013402000	SEPARATOR, AF, 2-STAGE, 230CFM,	1	0	1	146.59	146.59	N
QUP	11058gX002	AY, CON-ROD (HP)	1	0	1	479.58	479.58	N
QUP	0650010006	AIRNET FLANGE GASKET 100MM	1	0	1	35.23	35.23	N
SRV	OIL-TOOL-T	Summer Tool Oil 8 oz.	5	0	5	4.58	22.90	N
LAB	LABOR CHARGE	Hourly Service Charge	6	0	6	70.00	420.00	N
LAB	TRAVEL MILES	PORT TO PORT TRAVEL 75 CENTS PER MILE	75	0	75	0.75	56.25	N

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

This would be a normal 8.5 X 11" invoice that is sent out as a PDF, Directly from ProTrac.

This form is EMAILED Directly from ProTrac

Non-Tax Total:	1160.55	Sub Total:	1160.55
Taxable Total:	0.00	Misc Charges:	0.00
		Discount:	0.00
		Tax:	0.00
		Freight:	0.00
		Invoice Total:	1160.55

X \_\_\_\_\_  
 Received By  
 Thank You

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

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 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

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

SOLD 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    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.