Service Jobs

1. From the **Orders** tab in the Opto Ribbon, click on the *Edit Factory Order* icon. In the Order No field, press **<F2>** to display a list of production orders.

HOME HOME Save	CONTACTS	RESOURCES INVENTOR Edit Sales Orde Process Sheet	QUOTES PURCHASIN er ts: Cancel Sales Order (Sales) Sales Order	IG ORDERS JOBS/SCI Callup Sheet (Sales)	HEDULING INVOICING C Left Factory Order Despatch (Factory) actory Left Process Sheet (Factory)
Edit Facto	ry Order <u>Client Code:</u>	Client Name:	Test Certificate Required	Contact Name:	Type: For Stock
Details Su Date Entered Client Order	b Parts More Info 1: Date Received:	Review Despatch Desp Info Emp No: 0 Div: Sales ID: Jo	a Allocation QMS/Notes rder On Hold Shipping a Type: Cat:	Address 💿 Normal 🔘 U	rgent Pickup Paid
Project: Quote 1:	<u>Quote 2:</u> ص	Quote 3: Sale:	Order No: Re-Work Job: Pr	noject Job: Fas	n No: KNo: e, Orig Due Date Rev Total Unit Due Date Tax

2. In the popup, you can see which orders are service jobs by looking at the "Ser" column. Select the required order, and click **Ok** to continue.

	Ord No	Date	DIV	Client Code	Cust Order No	Job Description	Status	TYPE	Desp	Cnt	Pick No	Typ	S
1	1195	01/04/19	1	ITMS		Non-productive works	ACTIVE	PR		1			N
2	1194	27/03/19	1	BADGER		PART 1	ACTIVE	PR		1			N
3	1193	28/02/19	1	STOCK		Machine Guard Plates	ACTIVE	PR	ALL	4			N
4	1192	06/02/19	1	BADGER		Main Control Station 2.5 Mirror S/S with bc	NOT Active	ST	ALL	1			N
5	1191	06/02/19	1	BADGER		Hall Lantern Assy Opal lens chime PI-LD33	NOT Active	DV		1			N
6	1190	06/02/19	1	BADGER		no cost Part subsitution	ACTIVE	PR		1			N
7	1189	14/03/18	1	ITMS		MISC TEST	ACTIVE	PR	ALL	1			N
8	1188	25/01/18	1-1	FERRET	PO:FE11772	Machine Guard Plates	ACTIVE	PR		3			N
9	1187	19/10/17	1	PEL MARINE	PO:66565	TEST OPTO QUOTES	NOT Active	PR	ALL	1			N
10	1186	29/09/17		FERRET		Machine Guard Plates	No Job Tickets	PR		1			N
11	1183	21/11/16	1	STOCK		The Complex Assembly	ACTIVE	ST		1			N
12	1182	16/11/16	1	A-Z		The Fantastic Assembly	ACTIVE	ST		1			Ν
13	1181	09/11/16	1	A-Z		Testing Part	NOT Active	PR		1			N
14	1180	08/11/16	1	STOCK		The Fantastic Assembly	NOT Active	PR		1			N
15	1179	02/11/16	1	A-Z		TEST - ADDED LINE ITEM PART	ACTIVE	PR		1			N
16	1177	09/06/16	1	ITMS		Part 400 INV STK Two Sub-Parts and WC2	ACTIVE	PR		1			N
17	1176	09/06/16	1	ITMS		Part 200 INV NSTK One Sub-Part & WC1	ACTIVE	PR		1			N
18	1175	09/06/16	1	ITMS		Testing Part	ACTIVE	PR		1			N
19	1174	09/06/16	1	ITMS		The Fantastic Assembly	ACTIVE	PR		1			N
20	1173	09/06/16	1	ITMS		Part 100 INV NSTK One Material & WC	ACTIVE	PR		1			N
21	1172	09/06/16	1	ITMS		Part 400 INV STK Two Sub-Parts and WC2	ACTIVE	PR		1			N
22	1171	09/06/16	1	ITMS		Part 300 INV STK One Material & WC1	ACTIVE	PR		1			N
23	1170	09/06/16	1	ITMS		Part 200 INV NSTK One Sub-Part & WC1	ACTIVE	PR		1			N
24	1169	09/06/16	1	ITMS		Testing Part	ACTIVE	PR	ALL	1			N
25	1168	09/06/16	1	ITMS		PART100 NSTK One Material + WC	ACTIVE	PR		1			N
26	1167	09/06/16	1	ITMS		The Fantastic Assembly	NOT Active	PR		1			Ye
27	1166	09/06/16	1	ITMS		PART100 NSTK One Material + WC	ACTIVE	PR		1			N
28	1163	14/01/16	1	FERRET		The Fantastic Assembly	ACTIVE	PR	PART	2			N
29	1162	21/12/15	1	BEAVER		The Fantastic Assembly	NOT Active	PR		1			N
30	1161	16/11/15	1	BEAVER		ikdseifougiewogi	No Job Tickets	PR		1			
31	1160	13/11/15	1	FERRET		Test Contact	NOT Active	PR		1			
32	1159	26/08/15	1	BEAVER		PART100 NSTK One Material + WC	ACTIVE	PR	ALL	2			N
33	1158	26/08/15	1	BEAVER		PART100 NSTK One Material + WC	ACTIVE	PR	PART	2			N
34	1156	05/05/15	1	A-Z		NO MATERIAL/WORK PART	No Job Tickets	PR		1			
35	1151	31/10/14	1	CAM METALS		nmkhikuha	NOT Active	PR		2			N
36	1150	23/10/14	1	EAGLE		Testing	NOT Active	PR		1			N
37	1146	05/08/14	1	STOCK		The Fantastic Assembly	ACTIVE	PR		1			N
38	1096	08/09/11	3.3	BRIS ENG	2232	The Fantastic Assembly	ACTIVE	PR	ALL	3			N
39	1050	25/08/10	4.4	ALIST WIDE	326	KTT PART - Not for Stock	ACTIVE	PR	ALL	1			
	2050	23/00/10			520	ALTERN - HOLTON SCOCK		. K		-		_	_

3. With the Order now open in the *Edit Factory Order* window, navigate to the despatch tab and click in the "Service Job" tick box. Press **<F9>** to save. Once saved, this order will automatically create the Job Tickets and activate the Job. (but only if the 'Service Job' box has been ticked prior to saving).

💷 Edit Factory Order			- • •
Order No: <u>Client Code:</u> 1195 ▼ ITMS Details Sub Parts More Info Re	Client Name: Test Certifica	te Required Contact Name	e: Type: V For Stock V PR V Special Rate
Details Sub Parts More Info Re Desp No Desp Date Desp 1 Order Desp No Desp Date Desp 1 Order Conf Sent: Image: Conf Image: Conf Image: Conf V Service Job Image: Conf Image: Conf Image: Conf Image: Conf V Use in Scheduling Export Image: Conf Image: Conf Image: Conf V Use in Wip Must Recreate Image: Image: Conf Image: Conf Image: Conf Must Recreate Image: Image: Conf Job Conf Image: Conf Image: Conf Must Recreate Image: Image: Conf Job Conf Image: Conf Image: Conf Must Recreate Image: Image: Conf Job Conf Image: Conf Image: Conf Must Recreate Image: Image: Conf Job Conf Image: Conf Image: Conf Image: Conf Must Recreate Image: Conf Job Conf Image: Conf Image: Conf Image: Conf Image: Conf Image: Conf Jub Conf Image: Conf Image: Conf Image: Conf	eview Despatch Desp Info Allocation p Amt Invoice Status Exp Di firmed Forecast ted SQL bice Sales Order Created OPTO 01/04/19 2 stivated OPTO 01/04/19 1 mpleted	Address Label: BarTender 🖶 BRW 🖨 Despatch Label: BarTender 🔮 BRW 🖨 al First Work Date	Print Project Jobs Job No Status Tickets Created: Prick Status: Pick Status: Project Jobs Despatch Status: No Despatches: Perspatch Status: No Despatches: Prospatch Status: No Despatches:

4. From the *Process Sheet (Factory)* window, you can review the Job, edit hours and change materials where required. Once the job is costed, press **<F9>** to save. This will Despatch and create the invoice in the background. NO DATA ENTRY REQUIRED - But the data needs to be correct before you save. Then you can print the invoice from this screen.

File HOME CONTACTS RESOURCES INVENTOR	Y QUOTES PURCHASING ORDERS	JOBS/SCHEDULING INVOICING	QUALITY MANAGEMENT W	VORKSHOP ADMINISTRATOR	OPTO TOOLS	
New Save Clipboard Clipboard Image: Copy Solution of the second seco	der RHistory Sales Orders les) RCancel Sales Order t (Sales) Sales Order	Edit Factory Orde	r Callu Callu Callu Factory Order Factory Order	ap Sheet Parts Auto A sctory) Order o	Point f Sale	ata Set 👻 ilities 👻 vecials 👻
Process Sheet (Factory Order) Order No: Job Type: Div. 1195 PR 1 Job Control: NON-PRODUC Production Steps Despatch, Invol	Client Code: ITMS TVE WORKS IEss and History Transfer	rol (Service)	Antine Desce 14 Desce	100.0		
View the Costing	individual Job Set Status To	TIMS 1	V: Active: Done: Job status:	LAB - Charge MAT - Charge Total Excl	\$.00 \$.00 \$.00 Incl	\$.00
Despatch Invoidin	Ig Create Invoice Print Invo JOB IS ACTIVE - STARTED	Part Code L Part Descr NP I Non-productive King Cit Leave Maintenan Training Of Annual Leav	iption Est (H) Used (H) % ¹ works .00 6.50 J .00 1.00 .00 1.00 .00 .00 .00 .00 .00 .00 .00 .0	Curr Process Print Emp 1195-1 Cancelled No 1000 1000 No 2000 No 3000 No 3500 No 4000 No 1000 No	St First Date HF 01/04/19 01/04/19	RS Rate .00 .00 .00 .00 .00 .00 .00 .00 .00 .00
		faterial Code Desc	From Stack Pur/Order Unit C	Cost Total Price I Purch No Err	1p Pos Sell Price	M % Nor