

development details



November 2004

Effective in R6V02: IntelliDealer Work Order Assignment Feature

A new option called Work Order Assignment is included on the list of Supervisor Options in the Product Support Service module of IntelliDealer (Fig. 1). With this option, a service manager can easily view and make changes to all assigned and unassigned work orders. On this screen, the user can quickly change important information about the work order, including the assigned technician, priority, downtime delay code, start date and estimated completion date.

Another important system feature gives the user the ability to view either assigned work orders or unassigned work orders. To see all unassigned work orders (e.g., work orders assigned to special technician numbers like CUST or WARR that have a category value of "N/A" in Employee Master Maintenance), change the Select Technician field value to "*N/A" and click on Go>> (Fig. 2).

To see all assigned work orders, change the Select Technician field value to "*ACT" and click on Go>>.

The user can optionally click on the "Walk Around Sheet" link on the bottom of the screen to view and then print a list of the selected technician's assigned work orders (Fig. 3). This print-out allows the service manager to "walk around" with the sheet and make any special notations about each job (e.g., priority should be raised/lowered, estimated completion date needs to change). The service manager can then return to the work order assignment screen to enter these changes.

For more information on this software feature and others, contact PFW Client Services at (519) 474-3700, or e-mail support@pfw.com.

Supervisor Options

Select Technician: *ACT
 Select Model: []
 Select Type/Reason: []
 Select Shop/Day: ALL/ALL
 Select Salesperson: []
 Select Start Date: From: [] To: []
 Select Completion Date: From: [] To: []

Based On First Segments:
 Select Status: All
 Select Location: Guelph
 Select Customer: []
 Select Work Order: []

Go >>

Order Number	Technician	Technician Number	Priority	DDC	Start Date	Estimated Completion Date	Hours Worked	Job Code
C94824	NEW EQUIPMENT SET UP	NEW			05/21/2004	11/30/2003	11.20	15.01
C98039	NEW EQUIPMENT SET UP	NEW			03/22/2004	06/30/2004	0.00	5.00
C98040	NEW EQUIPMENT SET UP	NEW			03/24/2004	06/30/2004	0.00	9.00
C98070	NEW EQUIPMENT SET UP	NEW				06/30/2004	4.00	16.76
C98071	NEW EQUIPMENT SET UP	NEW			06/28/2004	06/30/2004	14.88	13.00

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Fig. 1

Select Technician: *N/A
 Select Model: []
 Select Type/Reason: []
 Select Shop/Day: ALL/ALL
 Select Salesperson: []
 Select Start Date: From: [] To: []
 Select Completion Date: From: [] To: []

Based On First Segments:
 Select Status: All
 Select Location: Guelph
 Select Customer: []
 Select Work Order: []

Go >>

Order Number	Technician	Technician Number	Priority	DDC	Start Date	Estimated Completion Date	Hours Worked	Job Code
C00077	CUSTOMER WORK	CUST					0.00	0.00
C99228	CUSTOMER WORK	CUST			07/01/2004	06/13/2004	1.80	2.90
C99700	CUSTOMER WORK LIMITED	CUST			04/13/2004	04/30/2004	0.00	0.00
C99770	CUSTOMER WORK	CUST				06/30/2004	0.00	1.00
C99826	CUSTOMER WORK	CUST			04/21/2004	04/30/2004	2.45	1.00

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Fig. 2

Walk Around Sheet 10/22/2004

Select Technician: *ACT
 Select Location: 01
 Based On First Segments: Yes

Allan Wafer (00285)

Work Order	Customer Name	Priority	DDC	Start Date	Estimated Completion	Hours Worked	Job Code
C00002 (214)	DAVE HERNACKI	1		08/31/2004	07/07/2004	0.11	2.60
C00047 (9490)	BOB & PAUL ZIMMER	2		02/24/2005	10/11/2004	0.00	0.00
C98444 (4710)	RUDOLF ENGEL	3		09/23/2004	09/24/2004	0.02	3.00
C00037 (2090)	HAROLD JONES			09/24/2004	09/29/2004	0.26	0.00
C00050 (9490)	BOB & PAUL ZIMMER			11/28/2004	10/11/2004	0.41	500.00

Annabelle Allsup (00037)

Work Order	Customer Name	Priority	DDC	Start Date	Estimated Completion	Hours Worked	Job Code
C97279 (9500)	JOE HOO-GINS	1		06/20/2004	07/09/2004	49.03	42.97
C99552 (9550)	CHASE TRACTOR LTD	2		06/21/2004	06/30/2004	27.44	0.00

Fig. 3



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