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215 – CREATING A WORKORDER

To create a new work order, perform the procedure in the following table:

| Action | | Result |
|------------------------------|---|--|
| 1. If | f the work order is for an existing client, find ne client's record in the client database. f the work order is for a new client, create a ew client record in the database. | Construction Const |
| 2. C | Click NEW WORK ORDER: | 440000 Call Log Order Notes Order Log Dan's Layout Spare WORKCORDER INVOICING JOB ENTRY CLIENTS INVENTORY Image: State of the state of |
| 3. V psl fi N pa | Verify the client's information. If you have erformed steps 1 and 2 correctly, the system hould have already filled in all relevant ields. Note: Be sure that you performed steps 1 and 2 roperly. Client data entered in this screen is not vailable to the rest of the system. | CLIENT PHONE (303) 442 4540 CLIENT EMAL COMPANY 303 Computers Corporation FIRST NAME 303 COMPUTERS |

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215 - CREATING A WORKORDER (cont')

| Action | | Result |
|--------|---|-----------------------------|
| 4. | Complete the HARDWARE INVOLVED section. Enter the make and model number of the system, and note all accessories—power adapters, power cords, laptop bags, etc.—the client left with the system. | |
| 5. | Complete the TROUBLE REPORTED section. This is possibly the most important section of the WORKORDER screen. Be sure to enter all information the client explains, even if it does not seem related to the problem. DO NOT attempt to diagnose problems while filling out this section. The client is waiting! | TROUBLE REPORTED |
| 6. | Complete the labor and login fields. Enter an estimate for the number of hours the problem will take to resolve. Remember to get the login and password for the system. | HOURS ESTIMATE |
| 7. | Complete the parts fields. If the repair will require parts, enter the parts that will be required and their estimated cost. | CITY PART DESCRIPTION PRICE |
| 8. | Print two copies of the work order by clicking the GENERATE WORKORDER button twice: GENERATE WORKORDER | |
| 9. | Give one copy of the work order to the client, and have them sign the other copy. | |
| 10. | Place the client's system on the shelf with the signed copy of the work order. | |
| 11. | Wish the client a good day. | |

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