

Sage Timberline Enterprise

Work Orders

Stay on top of all your service work activities with Sage Timberline Enterprise Work Orders, which are used to define, schedule, track, and bill service work. Because all work in Service Management is managed by using work orders, whether the work is initiated upon customer request, or from an ongoing maintenance agreement, they are critical to correctly allocating your resources.

Work orders are used throughout the service workflow, from the initial customer request, to scheduling the work, to documenting details about completed work, to billing for the work. You'll be able to view request details, such as the person who requested the work, the contact for the work, and the customer PO (if applicable).

Use work orders to capture the following information:

Financials

- Accounting data for the work, based on work types and products.
- Invoices for completed work.
- Pricing information for the work, whether calculated based on time and materials or using a defined fixed price.
- Purchase orders for parts needed for the work.

Service

- The service site for the work, and the customer to be billed or the associated job.
- The internal service center and department to perform the work.
- Scheduling details for the work, including requested dates and times, and trips required to perform the work.
- The scope of work to be performed, such as labor, parts, and miscellaneous items.

Following is a detailed list of Work Order features that puts you in complete control of your service management functionality, from initial request through completion of the job.

Work order generation

- Create work orders on demand, or create them automatically to fulfill work for approved work order quotes and approved preventive maintenance agreements.
- Generate work orders for customer service sites (to be billed to the customer), or for job service sites (to send costs to a job in Job Management).
- Create one or more scopes of work for a work order. Each scope can have different work types (call types) and rate sheets, and can be assigned to different service departments. Use standard scopes to quickly create a new scope.
- Define line items for each scope, organized into tasks if desired. Line items include labor, parts, miscellaneous, and "to do" lines.
- Use standard tasks and standard miscellaneous items to quickly create line items for a scope of work. Use standard flat rates to perform certain tasks at a flat rate.

BENEFITS

- Automatically generate work orders by a service agreement, approved quotes, or upon customer request
- Easily track labor, parts, etc. for each scope of work
- Produce invoices from work orders for partially or fully completed work

Service and billing

- Reference a one-time customer PO on a work order, or reference a blanket PO set up for the service site. For blanket POs, the work order displays the current amount accrued to the PO total, and whether the limit has been exceeded or the expiration date has been reached.
- Issue parts from your internal inventory, or purchase parts via a purchase order. Inventory and Purchasing are updated accordingly for allocations, issues, purchases, and receipts.
- Create one or more trips to schedule the work and assign technicians. Trips can be organized into multiple assignments if desired and then associated with specific scopes and tasks in the work order.
- Specify a due date or date range to set guidelines on when the work needs to be performed. When dispatch operators schedule the work, they can view the due dates and will be warned if they schedule the trip for a date outside of the due dates.
- Create invoices for the work order. You can partially bill the work order as certain work is completed, or you can bill the full amount when all work is finished. If desired, you can enable a review process so that completed work must be flagged as reviewed before it can be invoiced.

Workspaces

- Apply filters to display exactly the information you want to see.
- Search for specific information using exact match or partial match criteria.
- View stored information on the screen through an interactive inquiry.
- Drill down from summary information to supporting detail.
- Perform tasks with the shown information.

Work Orders is a part of Sage Timberline Enterprise, a tightly integrated business management solution designed to simplify the complex needs of service and specialty contractors.