Enabling Repair Orders and Setting Repair Preferences

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Overview

There are 2 types of Repair Order, Internal & External.

- Internal
 - Repair
 - Taking broken item in my inventory and repairing it to keep it in stock.
- External
 - Return & Repair for Customer
 - Customer sends in a broken unit, you fix it and return it to the Customer
 - Return & Repair for Stock
 - Customer sends in a broken unit, you fix it and return the Repaired Item to Stock
 - Return & Replace
 - Customer sends in a broken unit and you Replace the Item, sending them a Replacement immediately after inspecting the unit.

Learn More about Internal Repair Orders

Learn More About External Repair Orders

Enabling Repair Orders

ØrderTime						
# Home	🏘 Sales	F Purchasing	O ₀ ⁰ Production	Repairs	Warehouse	🖨 Reports
Admin > Compa	any Preferences					
Company Pr	references					
Section		Repairs				
General		Disable R	epair Orders			
Activities		For custor	mer repair orders, allow a	dding a lot or serial no	o if not contained in the list	
Doc #s		Default Repai	ir Bin:			
Inventory		C-1 (HQ)				
Sales						
Shipping						
Payments						
Purchasing						
Receiving						
Production						
Repair Orders						
Mobile						
Mail and Calence	dar Integration					

• Head to Admin > Company Preferences > Repair Orders

- Uncheck the Disable Repair Orders preference
- In order to add a lot or serial number for repair orders, check the option called "For customer repair orders, allow adding a lot or serial no if not contained in the list." (Optional)
- Select the Default Repair Bin (**Optional**)
- Click Save

Creating and Editing the Repair Item Group

The Repair Item Group is VERY similar to Service Items that you use in the system already. Components are used like a Bill of Materials that makes up the Repair Item. So you have your components, you repair the item similar to a Work Order, and you end off with an Item.

# Home	🛷 Sales	Ħ	Purchasing	ϕ_0^{0} Production	🛷 Repairs	Warehouse	🖨 Reports
Admin > Profile I	.ists → Item Grou	ιp					
Item Group							
Active Status			Repair Items G	iroup			
Active In	nactive O Both	1	Nam	Repair Item Group			
Records		0	Short Nam	RPI			
21 Solution		0	Item Typ	Repair			~
Additional Fees		•	ls defau	lt 🔽			
Assembly Group		0	Activ	ve 🔽			
Hardware		0	Default Account	ts			
Jobs Group		•	Income Accourt	nt Sales [Income]			~
Kits Group		0	Expense Accourt	Insurance - Disab	lity [Expense]		~
Men & Woman S	ierum	•	UOM Se	FALCASE 12			*
Non-inv Group		•	Is Sol	id 🔽			
Other Charge Gr	oup		Is Use	nd 🗌			
Pizza Bagel Boxe	s	•	Is Purchase	ed 🔲			
Repair Item Gro	JP	0	Item Cost Typ	Sum of Bill of Mat	erials		~
Services Group		•					

- Head to Admin > Profile Lists > Item Group
- Hit the **plus sign** on the left to create a new Item Group
- Set a Name & Short Name
- Make sure the Item Type is **Repair**
- Set the Default Accounts: Income Account, Expense Account
- Make sure Repair Items are either Sold, Used, or Purchased depending on your business

Setting up the Doc Statuses for your Repair Orders

Similar to Doc Statuses for other types of documents, you can customize the statuses you use for Repair Orders.

All Orders Demo Sandbox	Logout	
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Save Reset

# Home	🚸 Sales	Purchasing	Q [®] Production	🛷 Repairs 🛛 📦 V	Varehouse	😫 Reports
dmin → Doc St	tatus					
ocument	Status					
Sales Order						
Quote		1	lame	Туре	Active	Actions
Ship Doc		- 1	New	Processing	true	
Customer Ret	turn	= 1	Waiting for Approval	Payment Pending / Not	Ap true	
Purchase Ord	ler	= /	Approved	Approved	true	
Receiver		= 1	Received	Received	true	
Vandor Patur		= 1	/oid	Voided or Not Processe	d true	
Week Order		= 0	Elosed	Closed	true	
work order						
Uisassembly						
Transfer						
Adjustment						
Count						
Value Adjustr	ment					
Receive Oraba						

- Head to Admin > Doc Status > Repair Order
- Change the Names as you see fit if you'd like to customize
- Types used for Repair Orders include:
 - Processing
 - Payment Pending / Not Approved
 - Approved
 - Received
 - Voided or Not Processed
 - Closed

Use a Sales Order Custom Field for Sales Order Type

Important: We recommend that you create a Sales Order Custom Field to delineate whether the Sales Order is for a Sale or a Repair. This is for External Repair Orders. External Repair orders are always started with a Sales Order that you add a Repair Item to which begins the whole Repair Order process. You can use this Custom Field to identify Repair Sales Orders on the Sales Order List and to filter them out on Reports.

OrderTime											All Orders Demo Sandbox	Logout 🔞
🖷 Home	🏘 Sales	🗮 Purchasing	O ₀ ⁰ Production	Repairs	Warehouse	🚱 Reports						
Admin + Custom	n Fields											
Custom Field	ds										O Ad	d Custom Field
Types		Sales Order										15/30
Price Level Deta	a .	•										
Production Orde	er	FIELD		CAPTION			TYPE		REQUIRED	CALCULATED	DELETE	
Purchase Order		SOCust1		Test Cust Fie	ld		Memo		false	false	0	
Purchase Order	Items	SOCust2		DO this			Yes/No		false	false	0	
Receive Items		SOCust3		Part No			Text		false	false	0	
Receive Items It	ems	SOCust4		Project			Date		talse	talse	0	
Repair Order		SOCust5	c	ustom Field B	ditor		Web Clea		4-1	×	0	
Repair Order Ite	m	SOCusto									0	
Repair Order Ite	em Component	SOCust/	_	Caption	Sales Order Type						0	
Repair Order Ite	m Problem Code	SOCUSIO		Required						* 	0	
Sales Order		SOCust9	_	Туре	Pick List			~			0	
Sales Order Iten	ns	SOCust11		List Values		Add					0	
Sales Rep		SOCust12	_		Name	_		Delete			0	
Ship Doc		SOCust13			Repair			*			0	
Ship Doc Items		SOCust14			Sale			*			0	
Ship Doc Packag	ge	 SOCust15 									0	
										See Cance		
owered by Numb	erCruncher										Terms	of Use Privacy

- Head to Admin > Custom Fields
- Select Sales Order
- Click Add Custom Field in the top-right
- Caption it as **Sales Order Type**
- You might want to make this a **Required** custom field
- Choose the **Type: Pick List**
- Make a Value for **Repair** and a Value for **Sale**
- Click Save

Admin + Page Layouts + Page Layout				
Edit Details Page for Sales Or	der			Revert to Default Save Cancel
Properties Widgets	=			0 10
Account #	General	Bill Address	Ship Address	Summary
Additional Fee	No. Sample No.	WIDGETS INC.	WIDGETS INC.	Subtotal 0.00
Additional Fee	Customer Sample Customer	4525 MAIN 51. SUITE TOT MIAMI, FL 33312	4525 MAIN 51, SUITE 101 MIAMI, FL 33312	Ship Amount 0.00
Additional Fee Rate	Date 10/18/2021 Promise Date 10/18/2021	US Total Margin 100.00	US	Discount -0.00
Additional Fee Sales Tax	Customer PO Sample Customer PO	Total Margin 10.00 Percentage		Additional Fee 0.00
Allocation Percent	Contact Sample Contact			Total Amount 0.00
Allocation Status				Paid Amount -0.00
Allow Ship Partial		X		Balance 0.00
Assigned To	=			0
Balance	Items Details Memo & Instructions Cust	om Payments Ship Docs Dependency Attach	ments Open Activities Activity History	
Bill Address Alt. Contact				
Bill Address Alt. Phone	Test Cust Field Sample Test Cust Field			
Bill Address Care of	DO this D			
Bill Address City	Project 10/18/2021			
Bill Address Contact	Sales Order Type Sample Sales Order Type Shin Zone: Sample Shin Zone:			
Bill Address Country	Budget 100.00			
Bill Address Email	CM Sample CM Ship by Date 10/18/2021			
Bill Address Fax	Order Lead Time Sample Order Lead Time			
Bill Address Floor/Suite	c 10.00			
Bill Address Name/Company	REP SN Sample REP SN			
Bill Address Phone				
Bill Address Record Info				
Bill Address Sales Rep				
Bill Address State/Prov./Reg.				
Bill Address Street				
Bill Address Website				

- Head to Admin > Page Layouts
- Click on the Sales Order Details Page
- Drag Sales Order Type to the Custom Tab
- Click Save

praer i ime	•							All Orders Demo Sandbox Logout
# Home	🎻 Sales	₩ Purchasing O	Production	🛷 Repairs	Warehouse	🔅 Reports		
ldmin ⊧ Page	Layouts > Page Lay	out						
dit Editor	Page for Sales	Order						Revert to Default Save Cancel
Properties	Widgets	=						
Allow Ship Par	rtial	Customer ABC	C Customer Ltd					
Bill Address Al	lt. Contact	=						
Bill Address Al	lt. Phone	No			Date		Promice Date	Customer PO
Bill Address Ca	are of	Sample No.			10/18/2021		10/18/2021	Sample Customer PO
ill Address Ci	ity				r x ∕			
Bill Address Co	ontact	=		-				
Bill Address Co customer	opy changes to	Address Defau	ults Memo	& Instructions	Custom (+)			
Bill Address Co	ountry	Salar Order	Time					ī
Sill Address Er	mail	Sales Order	Type			~		
lill Address Fa	эх	Test Cust	Field Sample Te	est Cust Field				
Bill Address Fl	oor/Suite							
Bill Address Ni	ame/Company	DO) this 🕅			li		
Bill Address Ph	hone	Par	rt No Sample Pa	art No				
Bill Address Sa	ales Rep	Pri	oject 10/18/202	11				
3ill Address St	tate/Prov./Reg.	Ship Z	Zone: Sample St	nip Zone:				
ill Address St	treet	Bu	idget 100.00					
lill Address W	/ebsite		CM Sample C	м				
ill Address Zi	ip/Postal code	Shin by	Date 10/19/202					
ludget		Order Lead	Time Camala O	ada a filo and These				
		Graer Lead	Time Sample O	rder Lead Time				
lass		Contact Fund	ction Sample C	ontact Function				
M			c 10.00					
lontact		RE	P SN Sample R	EP SN				
ontact Functi	ion							
Jurrency								

- Head to Admin > Page Layouts
- Click on the Sales Order Editor Page
- Drag Sales Order Type to the Custom Tab

• Click Save

Editing the Profile Lists — Repair Order Type, Problem Codes & Warranty Type

Under the Profile Lists you can customize the Repair Names you want to have in the system and their corresponding Repair Type.

Order Time							
😭 Home	🛷 Sales	Ħ	Purchasing	🚓 Production	🛷 Repairs	🗑 Warehouse	🚯 Reports
Admin > Profile List	s → Repair Orc	ler Type					
Repair Order T	уре						
Active Status							
Active O Inac	tive 🔘 Both		Internal Stock				
Records		0	Name	Internal Stock			
Internal Stock		0	Repair Type	Repair			~
Repair	_	0	ls default	Internal Stock			
Return & Repair For	r Customer	0	Active	Repair Return & Repair Fo	or Customer		
Return & Replace	- Stock	0		Return & Repair Fo Return & Replace	or Stock		
Total Red	cords: 5						

- Head to Admin > Profile Lists > Repair Order Type
- Create new records by clicking the **Plus Sign** to the right of the word Records
- You can edit the **Repair Name**
- Choose the **Repair Type**:
 - Repair
 - Return & Repair for Customer
 - Return & Repair For Stock
 - Return & Replace
- Make your custom type the default with Is default or make certain types Active or Inactive
- Click Save

Warranty Types

Order Time	•					
😤 Home	🏘 Sales	📜 Purchasing	Q [®] Production	A Repairs	🗑 Warehouse	😫 Reports
Admin + Profile	le Lists → Warranty	Туре				
Warranty T	Гуре					
Active Status		New Custom	er - 1 Year			
O Active) Inactive O Both	h	Name	New Customer - 1 Y	'ear	
Records		0	Description	When the customer	r first purchases, they can	have a default 1 year
3 Year Warran	nty er - 1 Year	0		warranty. This cover	rs parts and labor for app	roveo repairs.
		Default leng	th of warranty in days:	365		
Tot	al Records: 2		Active			
		Value tra N. D.	e file Liet			-
• H6	ead to 🖡	amin > P	rofile List	s > warr	απτγ Τγρ	e

- Create New Warranty Types by clicking the **Plus Sign** to the right of Records
- You can set the Warranty Name
- Include a **Description** of what the warranty covers
- Set a **Default Length of Warranty in Days** (eg. 1 Year = 365)
- Set the Warranty to Active
- Click Save

Problem Codes

Problem Codes are used to track recurring things that can happen to an Item that needs to be repaired. Multiple problem codes can be applied to a Repair Order. You can make up and completely customize your Problem Codes.

Order Time							
🖀 Home	🏘 Sales	🐂 Purchasing	¢ ⁸ Production	🏘 Repairs	🗑 Warehouse	🚓 Reports	
Admin	Lists + Problem Coo	le					
Problem Co	de						
Active Status		LED Out					
O Active	Inactive OBoth	Name	LED Out				
Records		Description	This occurs when t	he LED flashes twice.			
LED Out		3					
Motor Out of Se	ervice (3				1	
Track Broken	6	3 Active					
Track Missing	(3					
Tota	l Records: 4						

- Head to Admin > Profile Lists > Problem Code
- Add a new Problem Code by clicking the **Plus Sign** to the right of Records
- You can set the **Problem Code Name**
- Write a **Description** for what causes the Problem Code or how to identify the problem
- Set the Problem Code to **Active**
- Click Save

Add the In Repair column to the Inventory List

ØrderTime All Orders Demo Sandbox Logout 6 # Home # Sales 🐂 Purchasing OC Production # Repairs 📦 W Report Warehouse + I Create New 👻 Inventory * 0 * Open Full List 🖉 Batch Action * Item Q ~ Recent Records BIN Floor Floor ITEM ■ Repair 1
■ 111
1689
1692 DESCRIPTION LOT / SE IN REPAIR ALLOCATED ~ LOCAT AVAILABLE UOM EXPIRATION
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 Text Layat

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 101
 3,224.00 779.00 10/18/2021 10/18/2021 0.00 612.00 300.00 HQ HQ EA oz -1.00 0.00 Sushi Mar A-1-P 612102 EA 11/20/2020 0.00 220.00 ★ 1002
 ★ 2
 ★ 1
 ♦ Follow up
 ♦ 1600
 ▲ 70E Soluti 1/4" Trays HQ 836419 2/21/2019 Floor 0.00 203.50 EA Parts Floor 323048 883.50 0.00 158.00 EA 10/18/2021 0.00 153.35 List Options - x 10/18/2021 0.00 124.00 10/18/2021 0.00 76.10 Filters Columns Othe 10/18/2021 0.00 68.00 3/30/2018 0.00 60.00 Available Top Up Down Bottom Add C Remove Item 10/18/2021 56.00 4/23/2021 0.00 49.00 Descripti Available Location 10/18/2021 0.00 30.00 Bin 10/18/2021 0.00 23.86 Bob Booked Cal 3 Lot / Serial N 8/6/2019 22.00 2/21/2019 0.00 20.00 Calc 1 Calc 2 UOM 10/18/2021 0.00 20.00 10/18/2021 0.00 18.00 Calc 4 In Repair 10/18/2021 0.00 14.00 Calc 5 3/21/2019 0.00 12.00 Save Cancel Reset

This column shows the quantity of that Item that are currently in Repair. This is very helpful to get an at-a-glance look at the stock that is being repaired.

- Head to **Open Full List > Inventory**
- Click the **cog** in the top-right of the list
- Click on the **Columns** Tab
- Select the In Repair column and click Add
- Click Save