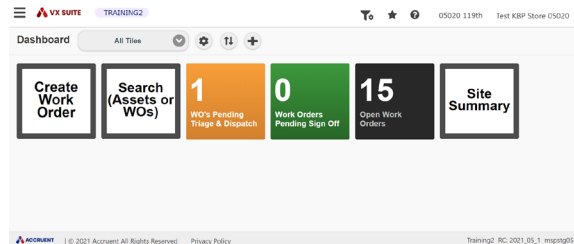


## Commercial Electronics (CE) - Create Work Order Process



1. **Create Normal Work Order** by clicking on the “Create Work Order” tile in Dashboard view.

A screenshot of the "CREATE WORK ORDER" form in the VX Suite application. The form has a header with a back arrow and the title "CREATE WORK ORDER" and subtitle "COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE". The form contains several sections: "Asset Tag" with a text input, "Scan" and "Search" buttons, "Asset Detail" section with a "Site" search input, "Site Layout" section with dropdown menus for "Department", "Category", "Subcategory", "Asset Type", "Problem Type", and "Priority", a "Problem Description" text area, "Upload Document" with a "Choose Files" button and "No file chosen" text, "Requestor" with a text input containing "Susanne Sticker", "WO Type" with "Normal", "Estimate", and "Quote" buttons, "Assigned Provider" section with an "Alternate Provider" dropdown, and "Save" and "Cancel" buttons at the bottom.

- Select site location number:** Type in 4 or 5-digit site number in amber colored box and selecting location once it shows up in drop down below (remember that all KFC locations have a "0" in front of the last 4-digits of the restaurant number – ie: G135020 is 05020 in vx)

**CREATE WORK ORDER**  
COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE

Asset Tag  Scan Search

**+ Asset Detail**

Site  1 × 🔍

**+ Site Layout**

- Select asset tag on item that work order is being created for:**

**A.** Click on "Search" button

**CREATE WORK ORDER**  
COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE

Asset Tag  Scan Search 2A

**+ Asset Detail**

Site  × 🔍

**+ Site Layout**

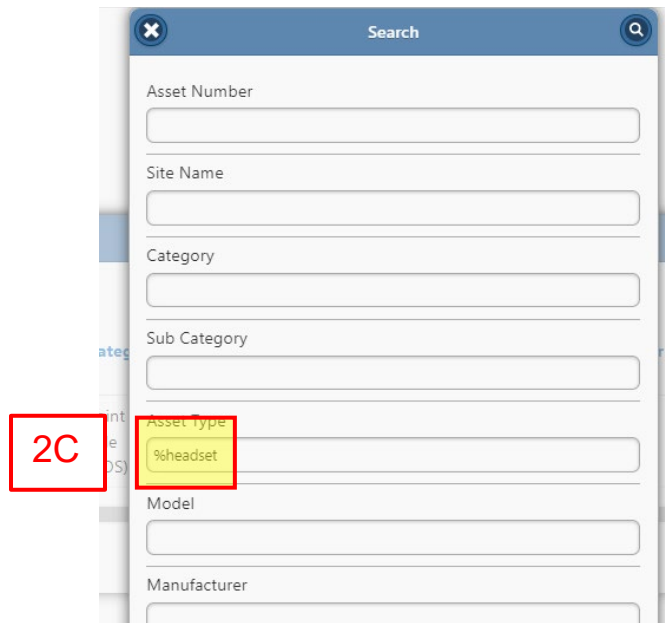
**B.** The asset list for this location will appear. Click on the "Filter" button.

**Select an asset**

Columns Filter... 2B 17 20 ➡

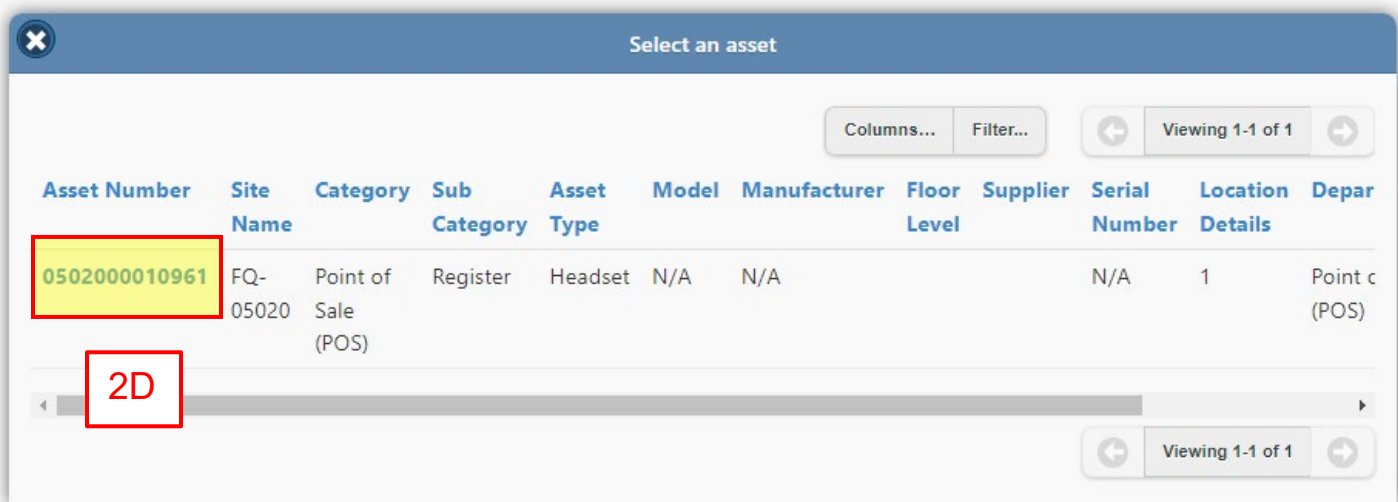
Asset Number	Site Name	Category	Sub Category	Asset Type	Model	Manufacturer	Floor Level	Serial Number
<a href="#">0502000010571</a>	05020	Kitchen Equipment	Cooking/Holding (HOT side)	Half Holding Cabinet (Chicken Cabinet)	AHC-993	Henny Penny		DK1209415
<a href="#">0502000010582</a>	05020	Kitchen Equipment	Cooking/Holding (HOT side)	Half Holding Cabinet (Chicken Cabinet)	AHC-993	Henny Penny		DK1209405
<a href="#">0502000010591</a>	05020	Kitchen Equipment	Cooking/Holding (HOT side)	2 x 2 Warming Drawer	DHB2PT-33KFCB	PRINCE CASTLE		GMGK202792
<a href="#">0502000010604</a>	05020	Kitchen	Cooking/Holding	Risrot	MARK V.	Ridgnett		079517CT05R

- C. The search box will appear and type in the following: % sign and brief description of the item you're looking for, then hit Enter. For these invoices, you are looking for either "Headset" or "Drive thru Timer". This will look like "%Headsets" in the "Asset Type" box and it will pull all items with the name "Headset" in it. This will narrow your search to only a few items.



A screenshot of a search dialog box titled "Search". It contains several input fields: "Asset Number", "Site Name", "Category", "Sub Category", "Asset Type", "Model", and "Manufacturer". The "Asset Type" field is highlighted in yellow and contains the text "%headset". A red box labeled "2C" is positioned to the left of the "Asset Type" field.

- D. Once you hit Enter, the search will generate a list of items with the name "headset" in it. From there, select the asset you want for the work order for by clicking on the correct blue colored asset number.



A screenshot of a table titled "Select an asset". The table has the following columns: Asset Number, Site Name, Category, Sub Category, Asset Type, Model, Manufacturer, Floor Level, Supplier, Serial Number, Location Details, and Departure. The first row is highlighted in yellow, and the asset number "0502000010961" is highlighted with a red box labeled "2D".

Asset Number	Site Name	Category	Sub Category	Asset Type	Model	Manufacturer	Floor Level	Supplier	Serial Number	Location Details	Departure
0502000010961	FQ-05020	Point of Sale (POS)	Register	Headset	N/A	N/A			N/A	1	Point c (POS)

- E. Once the correct asset tag is selected, it will populate asset information in the Create Work Order screen

**CREATE WORK ORDER**  
COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE

Asset Tag: 0502000010961 [Scan] [Search]

**+ Asset Detail**

Site: FQ-05020

**+ Site Layout**

WO Type: **Normal** | Estimate | Quote

External Information: **+ Lease Information**, **+ Project Information**

Department: Point of Sale (POS) | Category: Point of Sale (POS) | Subcategory: Register | Asset Type: Headset

Location Details: 1

Problem Type: [Dropdown]

- F. Fill out the remaining fields including Work Order Type, Problem Type, Priority Problem Description, Upload Document (if you have anything to upload), Alternate Provider.

WO Type: **Normal** | Estimate | Quote

External Information: **+ Lease Information**, **+ Project Information**

Department: Point of Sale (POS) | Category: Point of Sale (POS) | Subcategory: Register | Asset Type: Headset

Location Details: 1

Problem Type: [Dropdown]

Priority: P3 - Medium (2 days onsite)

Problem Description: [Text Area]

Include in Asset Spend:  Yes

Upload Document: [Choose Files] No file chosen

Requestor: Brad Shaw

**+ Assigned Provider**

Alternate Provider: [Dropdown]

[Save] [Cancel]

**WO Type:** Select Normal or Estimate (we do not use the Quote option). Estimate will require that an estimate be provided and approved before work starts.

**Problem Type:** Select most appropriate description from drop-down menu.

**Priority:** Select timing of how quick you would like the service provider to respond from the drop-down options

**Problem Descr:** Type in any additional information you would like to provide to the service provider on what needs to be done for this work order.

**Upload Document:** Click “Choose Files” if you want to upload a support document. This will prompt you to select a file from your computer.

**Alternate Provider:** Click the “Assigned Provider + button” to see if a service provider is currently selected for this work order. If one is not assigned and / or you want to change to a different service provider, select “Alternate Contractor” from the drop-down menu.

Upload Document:  No file chosen

Requestor: Brad Shaw

**Assigned Provider**

PAR TECH - KBP ONLY  
 Preferred  
 PO BOX 536257  
 Pittsburgh, PA 15253  
 Phone: (111) 111-1111  
 Email: KBP.AP@KBPbrands.com

Alternate Provider:

**Assigned Provider**

Alternate Provider:

Alternate Contractor  
 PAR TECH - KBP ONLY  
 PARTS TOWN  
 RESTAURANT SUPPLY CHAIN SOLUTIONS LLC - KBP ONLY

This will populate a full provider list and you can filter the same way you did for the asset tag and select the provider of choice.

Search

Name:

Description:

Association:

Location:

Country:

Distance From Site:

Provider Type:

Preferred Contact Method:

- G. It is imperative that you pick the correct company for the repair needed!
- a. **Commercial Electronics** – is for **HEADSETS** and **DRIVE THRU TIMERS** only if you have an HME system. HM Electronics (HME) is no longer a service provider option and anything needing to go to them will now be run through Commercial Electronics (CE).
  - b. **Summit** – is for **DRIVE THRU TIMERS** only if you have a Summit system.
- H. Once all Amber colored fields are completed (filled out), the “Save” button in the bottom left will become solid and you click “Save” to complete the work order.

Requestor: Brad Shaw

**Assigned Provider**

**COMMERCIAL ELECTRONICS - KBP ONLY**  
3421 HOLLENBERG DRIVE  
Bridgeton, MO 63044  
Phone: (314) 739-0248  
Email: info@cerepairs.com

Alternate Provider: Alternate Contractor

Save Cancel 2H

- I. Once Save is selected, you may get a “Duplicate Work Orders Found” screen pop up. This is notifying you that there are similar work orders created which allows you to confirm this is not a duplicate. In majority of cases, the same work order request has not been created. If this is the case, select “Create Work Order”

Duplicate Work Orders found

Columns... Filter... Viewing 1-1 of 1

WO #	Created	Status	Provider	Type	Problem Type	Space	Completed	Recall	Watching	Watching
<a href="#">64425871</a>	04/07/2022	Pend.	HM ELECTRONICS, INC. - KBP ONLY	Normal	Replacement	N/A			Watch	Add / Remc

Excel Document Export Viewing 1-1 of 1

Create Work Order Cancel 2H

- J. When new Work Order is created, you will get the below screen providing the new Work Order number created. Click “OK” in bottom left of screen to complete process.

