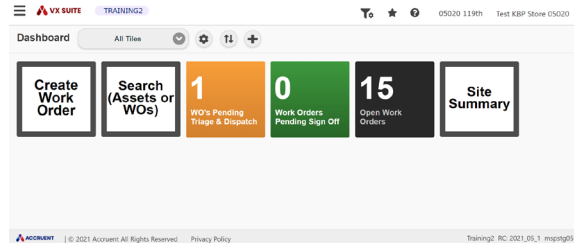


Create Work Order



Clicking the Create Work Order tile on the dashboard opens the Create Work Order form which allows users to quickly create a new work order.

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

Asset Tag

+ Asset Detail

Site

+ Site Layout

Department

Category

Subcategory

Asset Type

Problem Type

Priority

Problem Description

Upload Document No file chosen

Requestor

WO Type Normal Estimate Quote

+ Assigned Provider

Alternate Provider

1. **Select site location number:** Type in 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

+ Asset Detail

Site

+ Site Layout

2. **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

+ Asset Detail

Site

+ Site Layout

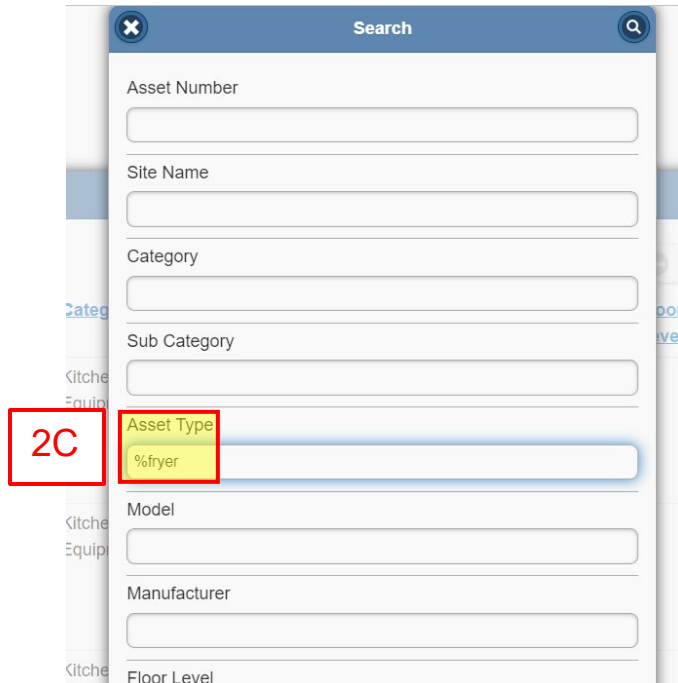
- B.** The asset list for this location will appear. Click on the “Filter” button

Select an asset

Columns 1-20 of 117 20

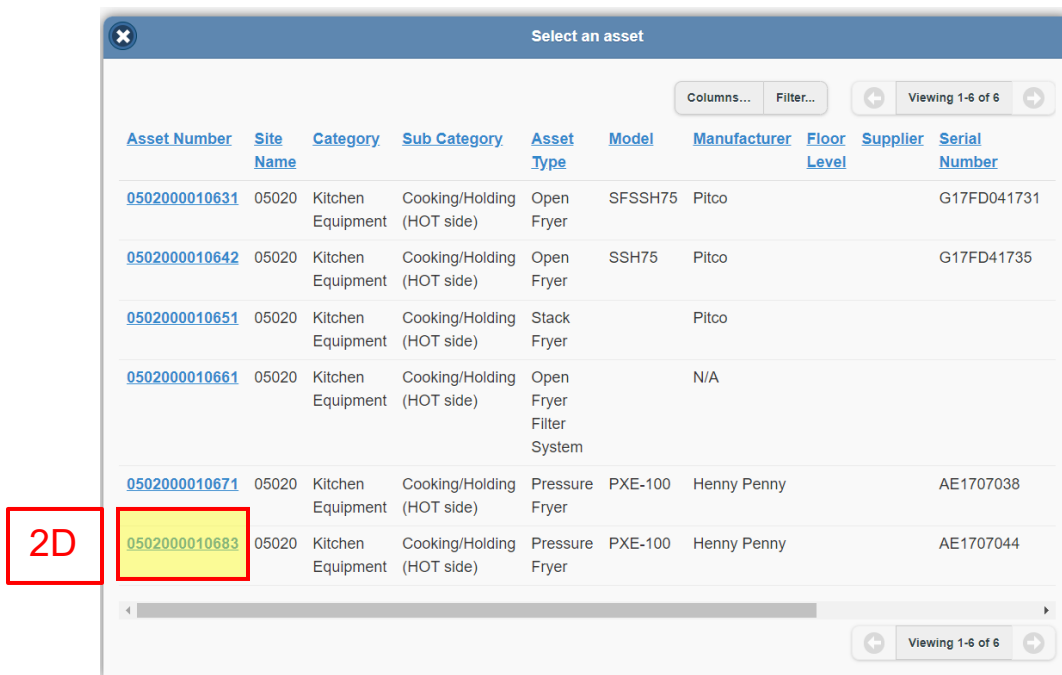
| Asset Number | Site Name | Category | Sub Category | Asset Type | Model | Manufacturer | Floor Level | Supplier | Serial Number |
|-------------------------------|-----------|-------------------|----------------------------|--|---------------|---------------|-------------|----------|---------------|
| 0502000010571 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Half Holding Cabinet (Chicken Cabinet) | AHC-993 | Henny Penny | | | DK1209415 |
| 0502000010582 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Half Holding Cabinet (Chicken Cabinet) | AHC-993 | Henny Penny | | | DK1209405 |
| 0502000010591 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | 2 x 2 Warming Drawer | DHB2PT-33KFCB | PRINCE CASTLE | | | GMGK202792 |
| 0502000010604 | 05020 | Kitchen | Cooking/Holding | Risquit | 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. In the below instance, we are looking for a pressure fryer so type "%fryer" in the "Asset Type" box and it will pull all items with the name "fryer" in it. This will narrow your search to only a few items.



The screenshot shows a search dialog box titled "Search" with several input fields. The "Asset Type" field is highlighted in yellow and contains the text "%fryer". A red box labeled "2C" is positioned to the left of this field. Other fields include Asset Number, Site Name, Category, Sub Category, Model, Manufacturer, and Floor Level.

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



The screenshot shows a table titled "Select an asset" with columns for Asset Number, Site Name, Category, Sub Category, Asset Type, Model, Manufacturer, Floor Level, Supplier, and Serial Number. The asset with ID 0502000010683 is highlighted in yellow, and its ID is also highlighted in a red box labeled "2D".

| Asset Number | Site Name | Category | Sub Category | Asset Type | Model | Manufacturer | Floor Level | Supplier | Serial Number |
|-------------------------------|-----------|-------------------|----------------------------|--------------------------|---------|--------------|-------------|----------|---------------|
| 0502000010631 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Open Fryer | SFSSH75 | Pitco | | | G17FD041731 |
| 0502000010642 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Open Fryer | SSH75 | Pitco | | | G17FD41735 |
| 0502000010651 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Stack Fryer | | Pitco | | | |
| 0502000010661 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Open Fryer Filter System | | N/A | | | |
| 0502000010671 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Pressure Fryer | PXE-100 | Henny Penny | | | AE1707038 |
| 0502000010683 | 05020 | Kitchen Equipment | Cooking/Holding (HOT side) | Pressure Fryer | PXE-100 | Henny Penny | | | AE1707044 |

- 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: 0502000010683 [Scan] [Search]

+ Asset Detail

Site: 05020

+ Site Layout

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

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

Department: Kitchen

Category: Kitchen Equipment

Subcategory: Cooking/Holding (HOT side)

Asset Type: Pressure Fryer

Location Details: 3

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.

Normal | Estimate | Quote

+ Lease Information

+ Project Information

Department: Kitchen

Category: Kitchen Equipment

Subcategory: Cooking/Holding (HOT side)

Asset Type: Pressure Fryer

Location Details: 3

Problem Type: [Dropdown]

Priority: P3 - Medium (2 days onsite)

Problem Description: [Text Area]

Upload Document: Choose Files | No file chosen

Requestor: Brad Shaw | No file chosen

+ 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 Descrip: 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.

The screenshot shows a web form for creating a work order. The 'Assigned Provider' dropdown menu is open, displaying a list of providers. A red arrow points to the 'Alternate Contractor' option at the top of the list. A yellow box highlights the 'Alternate Provider' label at the bottom of the dropdown. The form also shows fields for 'Problem Description', 'Upload Document', 'Requestor', and 'Alternate Provider'.

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.

The screenshot shows a search dialog box for providers. The dialog has a search bar and several filter fields: Name, %Parts, Description, Association, Location, Country, Distance From Site, Provider Type, and Preferred Contact Method. A red arrow points to the search bar. The background shows a table of providers with columns for Provider Type and Preferred Contact Method.

- G. 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

PARTS TOWN
1200 Greenbriar Drive
Addison, IL 60101
Phone: (800) 438-8898
Email: chains@partstown.com

Alternate Provider: PARTS TOWN

2G Save Cancel

- H. 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

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

2H Create Work Order Cancel

- I. 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.

New Work Order Created

Work Order # 64434532 Created

OK Navigate To Work Order

- J. If the Service Provider has selected Phone notification versus e-mail notification, you will get a “Dispatch” screen. If so, complete the Amber colored line items and hit Save.

Dispatch

Assigned Provider PAR TECH - KBP ONLY
Description PAR TECH - KBP ONLY
Global Phone (111) 111-1111
Primary Contact
Primary Phone
Dispatch Phone

Person Par Tech Initial Admin User

Description SI30523495 - INVOICE WO ONLY
QSR#9 AND QSR#16 replaced both bump bars and cabling.

Call Type Dispatch Work Order

ETA 04/08/2022 08:53

Save Cancel