



Work Orders – Pro 9

“GETTING STARTED GUIDE”

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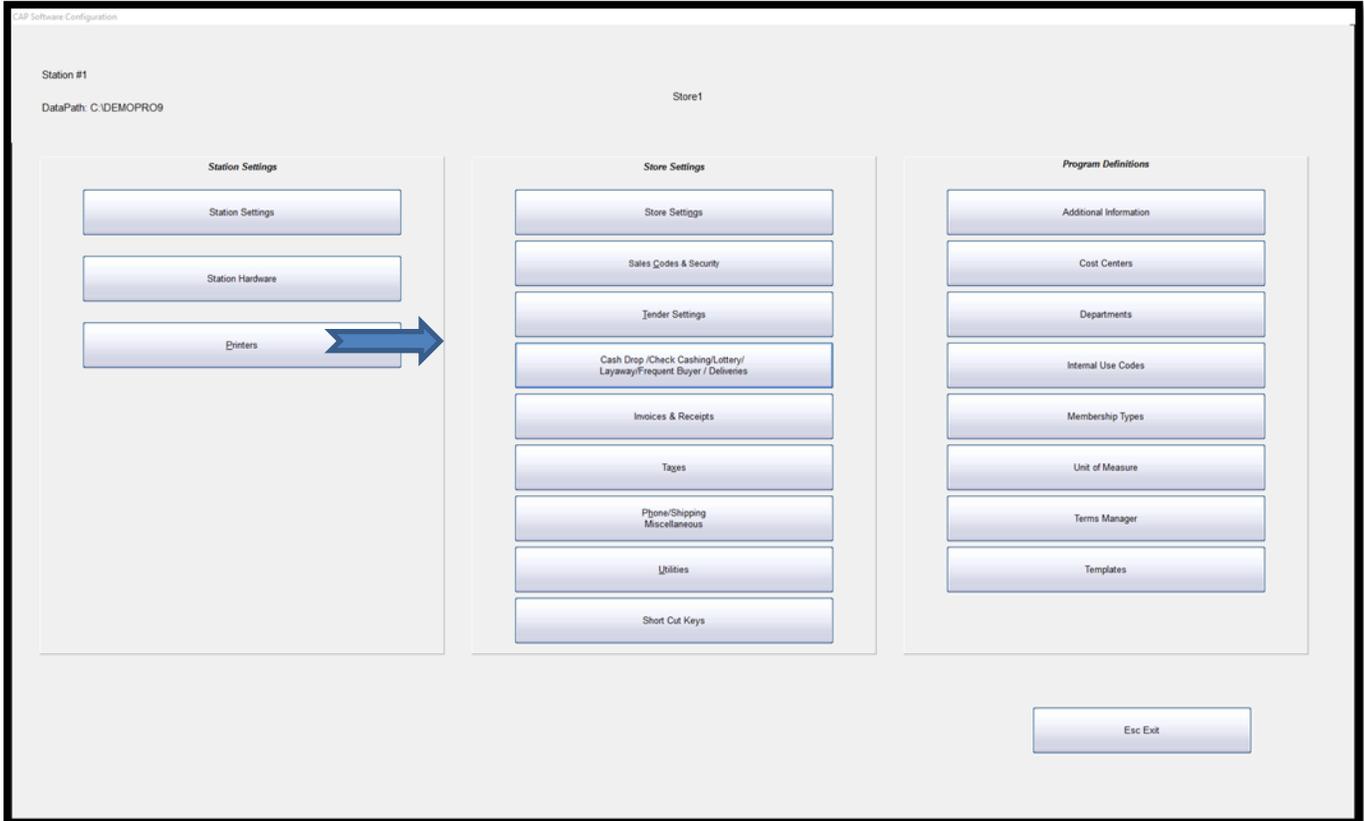
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Work Order Functions:

CAP Software upgraded the work order process to allow tracking of multiple vehicles, items and/or equipment information. Work orders can also track the details of work required, estimated completion dates and times as well as track the status of the work orders (ready for pickup, work order due by, work order in progress & cancelled work orders).

How To Configure Work Orders in CAP:

1. From the CAP SellWise back office toolbar, select **Help> Configuration>Cash Drop/Check Cashing/Lottery/Layaway/Frequent Buyer /Deliveries**. (See image below)



2. Scroll towards the bottom of the page to the section named **Work Orders** and set **Define Customer Items for use on Work Orders** to **Yes**. (See image below)

WORK ORDERS	
Define Customer Items for use on Work Orders	Yes
Work Orders used on	Vehicle
Work Order Item Template	Manufacturer:Model:Style:Miles:

3. Set **Work Order used on** to the necessary option that closely represents the type of Work Order you wish to use. The choices are:
- **N/A** – This means that you will not be entering specific information into your work order. (See image below)
 - **Items**
 - **Equipment**
 - **Vehicles**

WORK ORDERS	
Define Customer Items for use on Work Orders	Yes
Work Orders used on	Vehicle
Work Order Item Template	N/A
	Items
	Equipment
	Vehicle

4. Create a **Work Order Item Template** if desired. Please note, by applying a colon : at the end of any word or sentence, your cursor will go directly to the right of the colon after pressing Enter when creating new work orders in the POS. Also, the maximum number of lines per work order template is 5. (See image below)

Work Order Item Template

Note Edit Tools

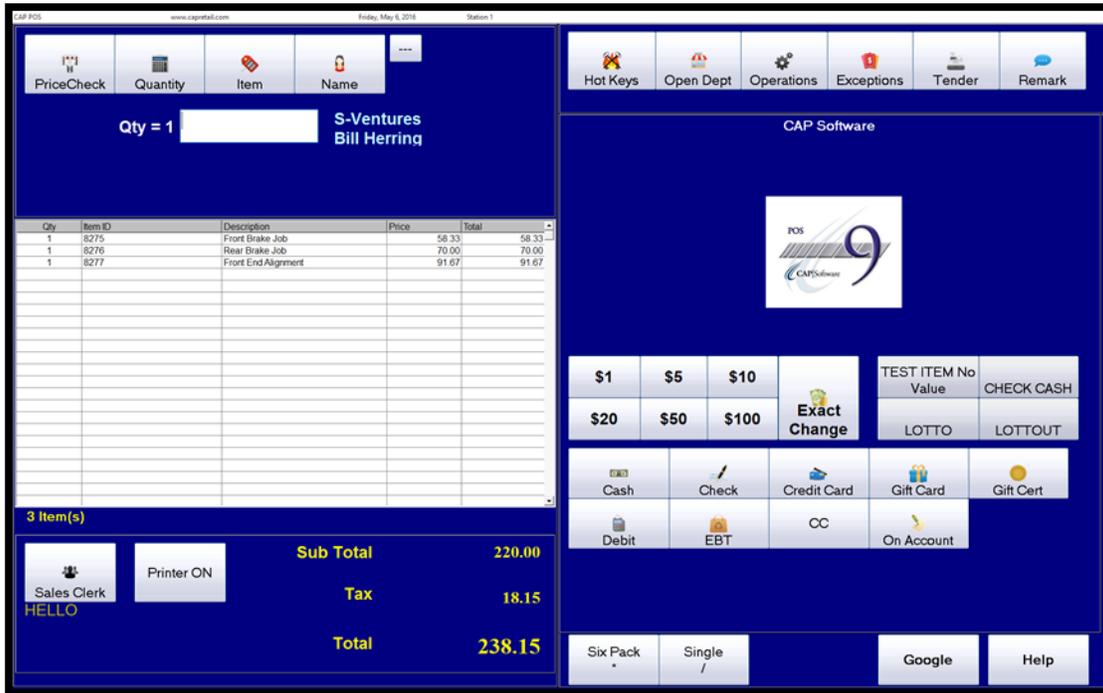
Manufacturer:
Model:
Style:
Miles:

Time Date Print Accept Cancel

5. Press **Accept** to save the changes and **Esc Exit** from *Configuration*. Then, properly close out of CAP SellWise. Upon reopening CAP SellWise and CAP POS the work order feature will be enabled.

How to Create a Work Order:

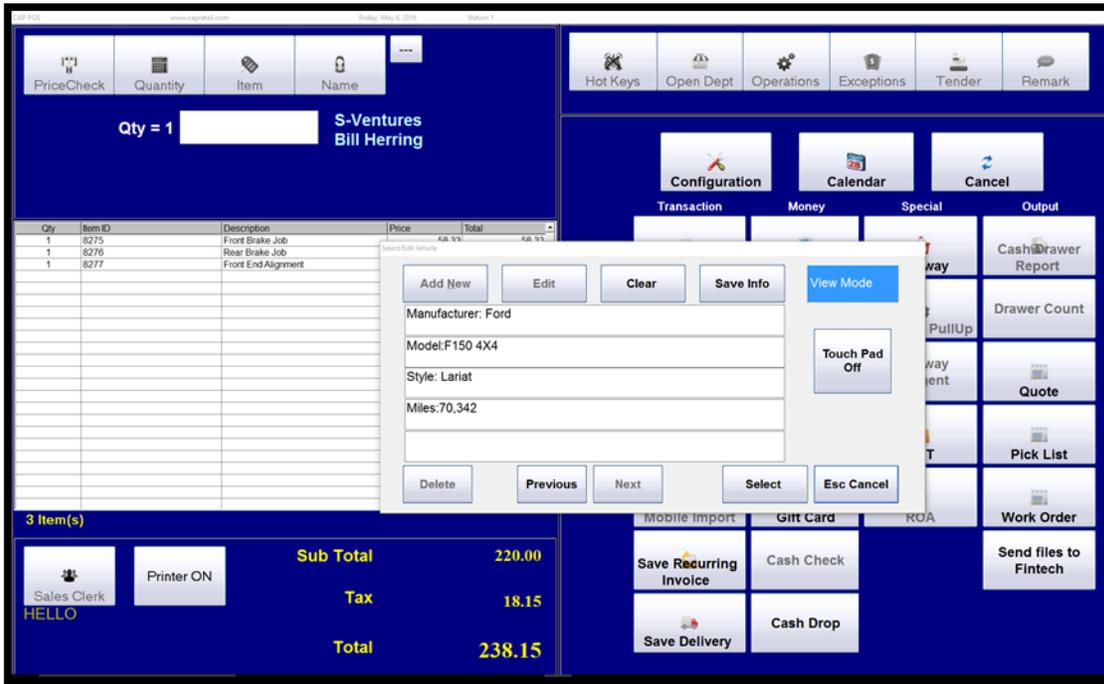
1. Open **CAP POS** and select the appropriate **Name** the work order will be for. Then, add the necessary **Item/Items** that should be included in the work order. (See image below)



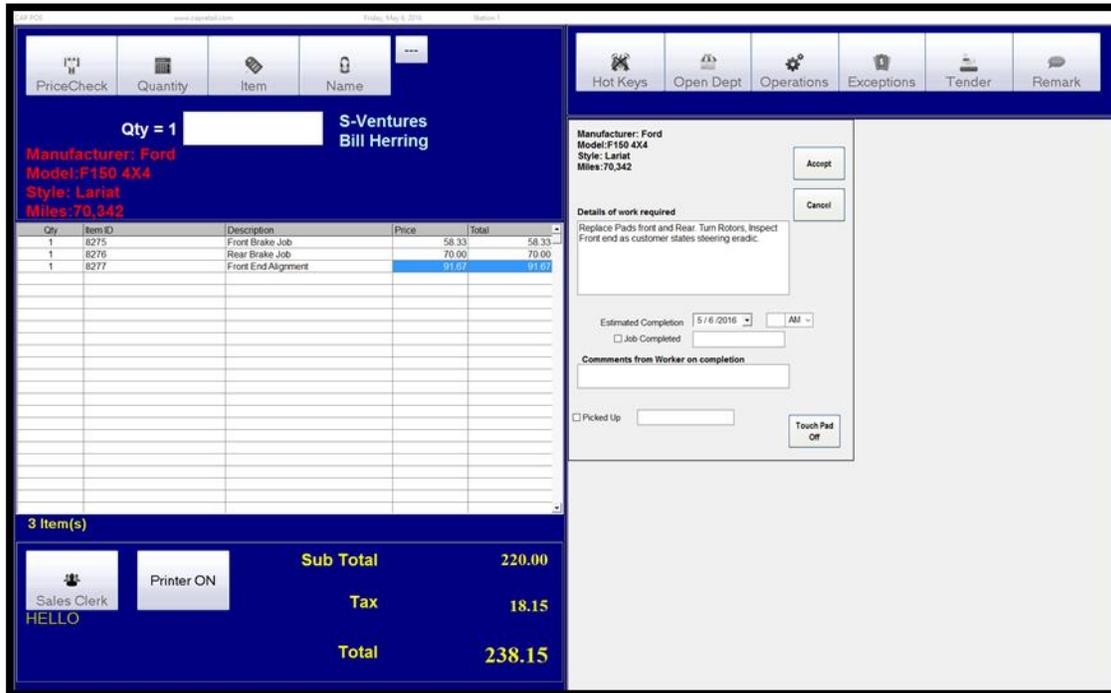
2. Select **Operations** and choose **Work Order**. (See image below)



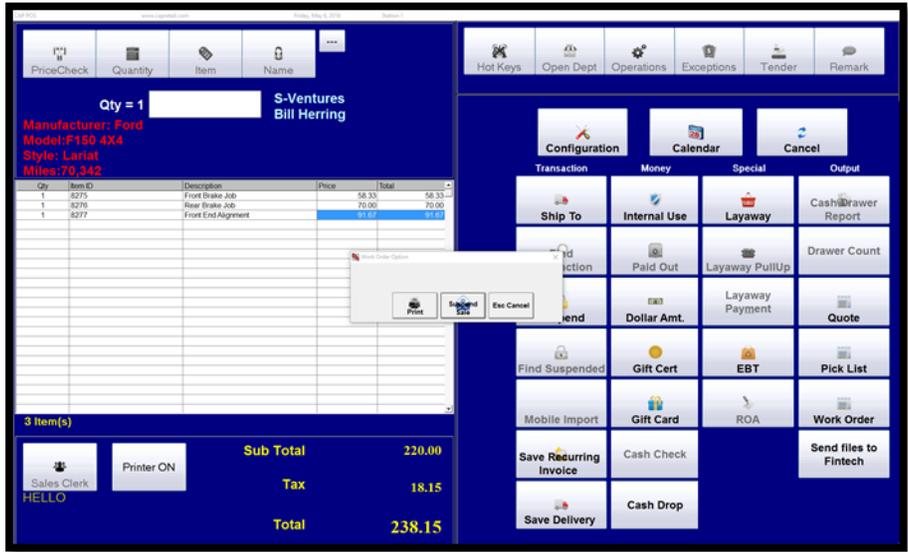
- 3. Add necessary information in conjunction with the work order template into the text box and press **Save Info** and then press **Select**. Please note this information can be used for future work orders for the selected customer as it saves to the customer's file. (See image below)



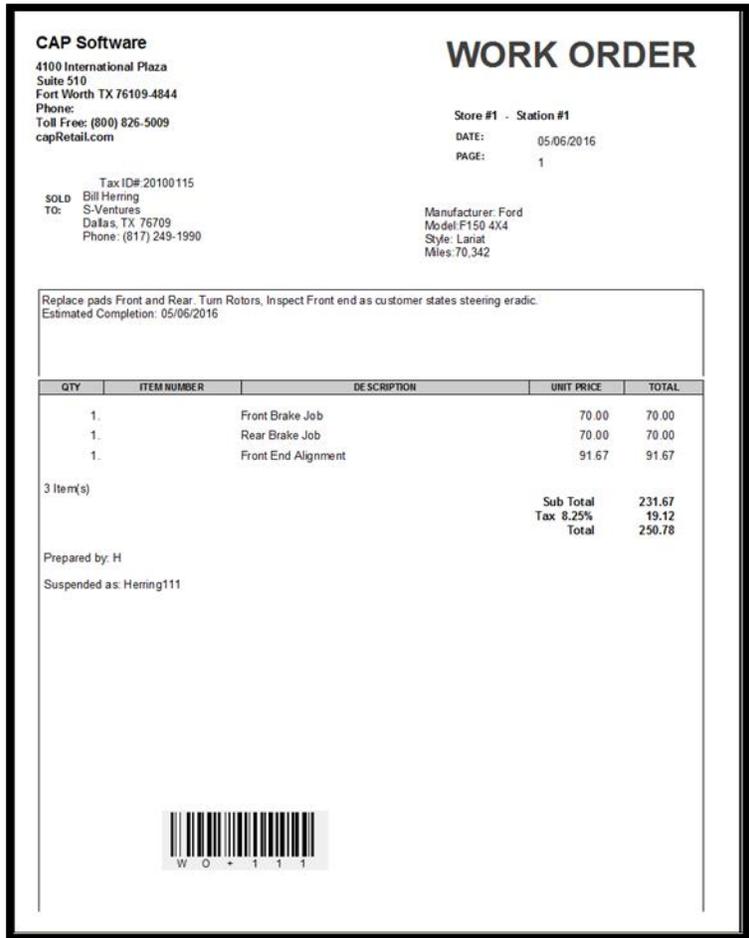
- 4. Enter the instructions for the work order. Select an **Estimated Completion** date if necessary and then press **Accept**. (See image below)



- 5. Make the selection to either **Print** out the work order or to **Suspend Sale** (save and suspend the work order) depending on your business needs. (See image below)

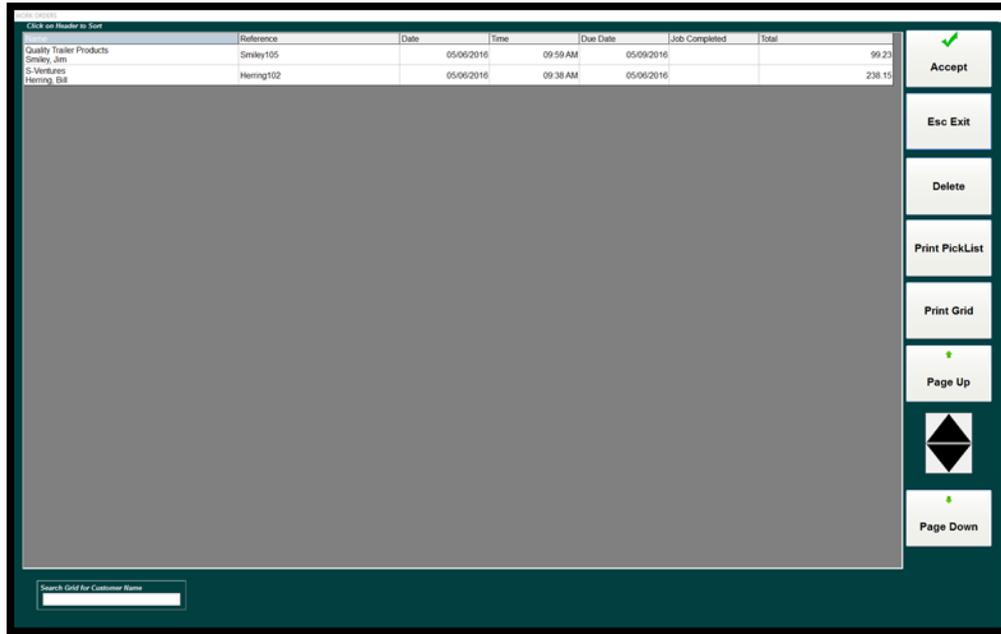


- Below is an example of what a printed work order looks like.

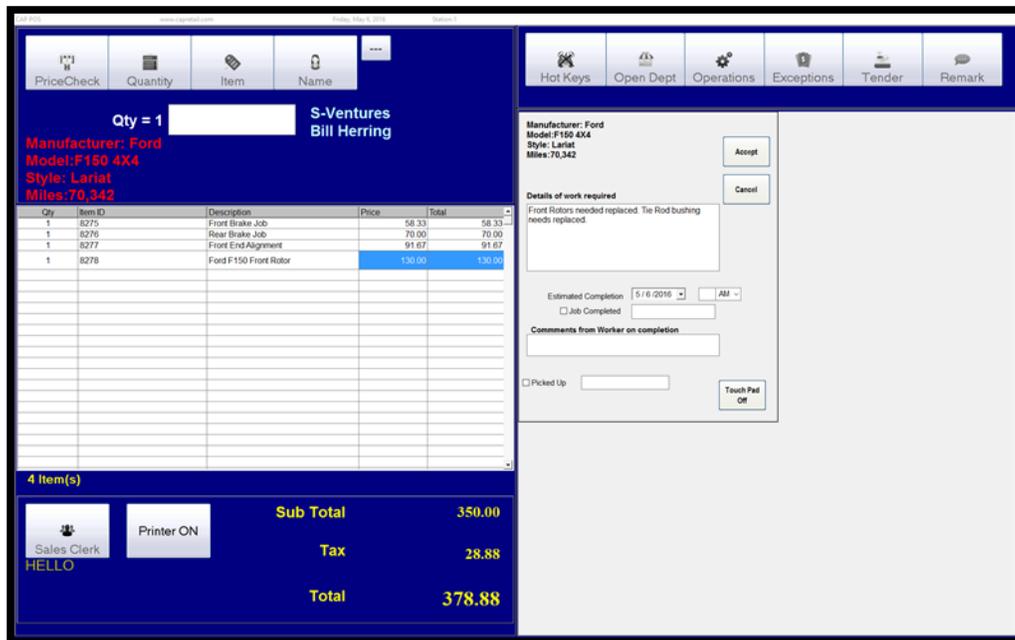


How to Edit a Work Order:

1. Open **CAP POS** and select **Operations>Work Order**. Select/highlight the work order you need to edit and press **Accept**. (see image below)
 - From this screen you are also able cancel a work order. Simply select/highlight the work order and select **Delete**.
 - From CAP POS, you can also scan the bar code at the bottom of the work order which will bring it to the POS screen.

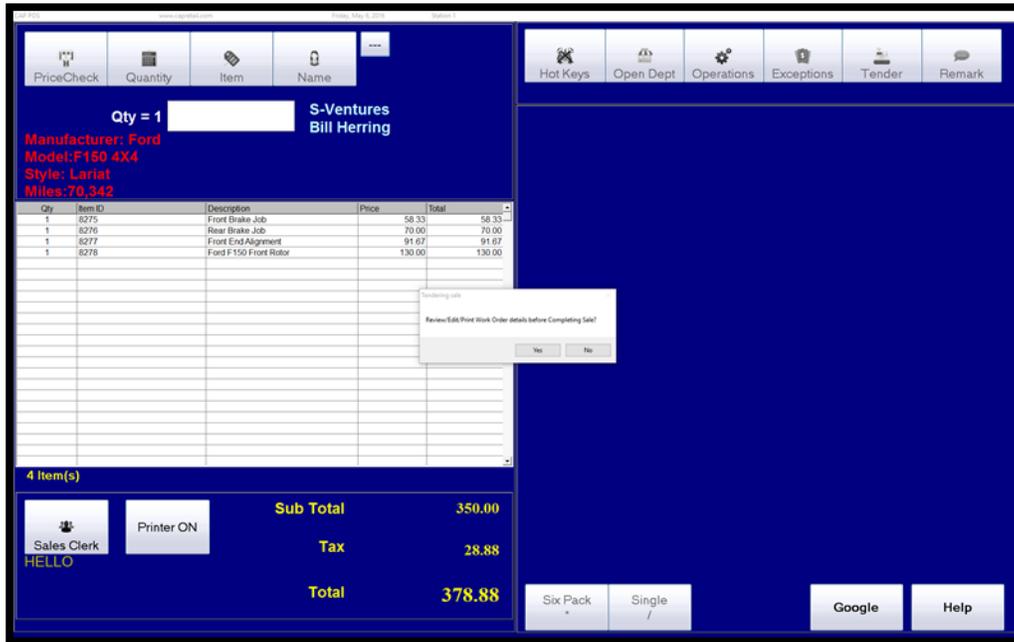


2. Add/modify the items necessary on the POS screen to the work order. Then go to **Operations>Save Work Order**.
3. Add/modify any notes in the **Details of work required** and press **Accept**. (See image below)

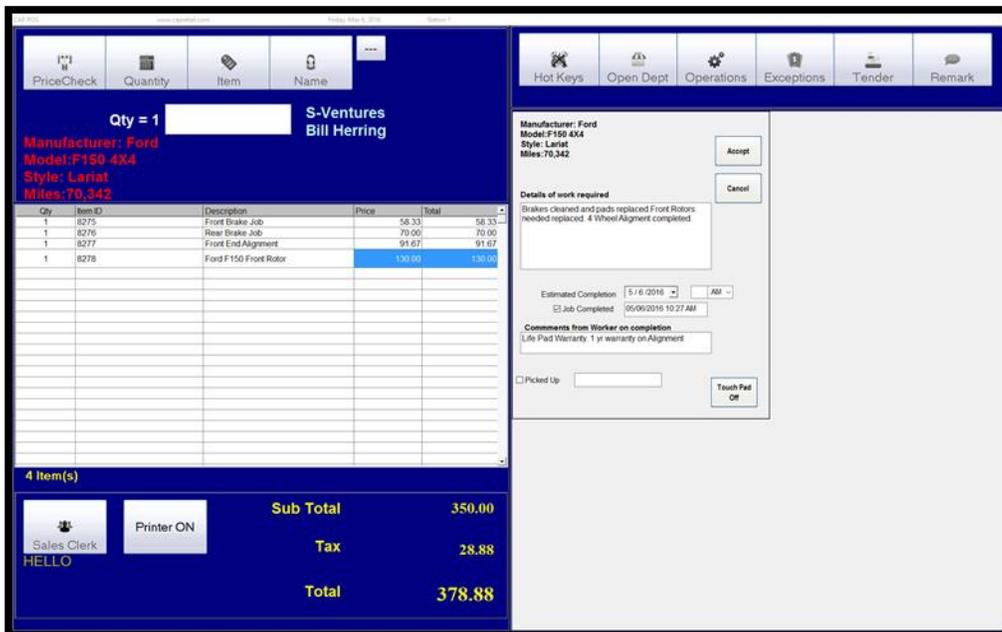


How to Finalize/Complete a Work Order:

1. Open **CAP POS** and select **Operations>Work Order**.
2. Select/highlight the work order to complete and press **Accept**.
3. Select the appropriate **Tender** type which will then ask if you would like to **Review/Edit/ Print Work Order details before Completing Sale?**
4. CAP suggests selecting **Yes** so that you can enter final work order notes. However, you may select **No** if notes do not need to be added for completion. (See image below)



5. Select **Job Completed** and press **Accept**. (See image below)



6. An option will appear to print the work order one last time.
7. Select the payment method and proceed to finalize the transaction. The work order has now become a sale and will no longer appear in the work order list.

How to Recall Or View a Completed Work Order:

1. Open **CAP POS** and select **Operations**.
2. Select **Find Invoice** and then select/highlight the invoice that the work order is associated with.
3. Press **View Work Order**. (See image below)

The screenshot displays the CAP POS software interface. At the top, there is a header section with fields for Number (0000412), Date (05/06/2016), and Time (10:35 AM). Below this, there are fields for Sales (H), Station (1), and Sold to (2491990 S-Ventures). A blue arrow points to the 'View WorkOrder' button in the top right corner. The main area is a table titled 'Transaction' with columns for Qty, Item ID, Description, Price, and Total. The table contains four rows of data:

Qty	Item ID	Description	Price	Total
1.00	8275, 8275	Front Brake Job	58.33	58.33
1.00	8276, 8276	Rear Brake Job	70.00	70.00
1.00	8277, 8277	Front End Alignment	91.67	91.67
1.00	8278, 8278	Ford F150 Front Rotor	130.00	130.00

At the bottom left, there is a navigation panel with buttons for Find, Previous, Next, Transaction, Date, and Customer. At the bottom right, there is a summary section with the following values:

Sub Total	350.00
Tax	28.88
Total	378.88
1234 Check	378.88
Discount	0.00

On the right side of the interface, there is a vertical toolbar with buttons for Cancel, Void, Return, Print, Email, Gift Receipt, Packing List, Ship To, and Remarks.

Work Order Reports:

4. From the CAP SellWise back office tool bar, select **Reports**.
5. Beneath the **Customer** section of Reports, select **Work Order**. You will see 4 different reports to choose from: (See image below)
 - **Ready For Pickup** – This report shows all work orders that have been completed and how long they have been complete.
 - **Due by...** – This report shows pending work orders with the desired completion date.
 - **Work in Progress** – This report shows all open work orders.
 - **Forecast Requirements** – This report shows items by department that are needed to fill/complete the work order for a specified ending date range.
 - **Cancelled** – This report shows all cancelled work orders as well as who cancelled them and when.

The screenshot displays the CAP SellWise Reports Menu interface. The main menu is divided into several sections: Sales, Inventory, Customer, Employee, and Custom. The Customer section is currently selected, and a sub-menu is open showing four report options: Ready For Pickup, Due by..., Work in Progress, and Forecast Requirements. A blue arrow points to the 'Ready For Pickup' option. To the right, a 'Select Store' dialog box is open, showing options for 'Select Date Range' (Year to Date, Month to Date, Last Year, Last Quarter, Month, Last Week, Current Selection) and 'Select Date and Time Ranges' (Today, All, custom date and time ranges). The 'Ready For Pickup' report is highlighted in the sub-menu, and the 'Calendar' button is visible in the 'Select Date Range' section.