

# Work Orders – Pro 9

"GETTING STARTED GUIDE"

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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)

NP Software Configuration		
Station #1		
	Store1	
DataPath: C:/DEMOPRO9		
Station Settings	Store Settings	Program Definitions
Station Settings	Store Settings	Additional Information
	Partie Dedas & Desailt	Cast Casture
Station Hardware	oaisz ⊼oosz e secnuk.	Cost Cerners
	Tandar Cattions	Departmente
	Tainte cannilla	Departments
Printers	Cash Drop /Check Cashing/Lottery/	Internal Lise Codes
	Layaway/Prequent Buyer / Deliveries	
	Invoices & Receipts	Membership Types
	Taxes	Unit of Measure
	Phone/Shipping Miccellaneous	Terms Manager
	mactitalitoua	
	Luities	Templates
	Short Cut Keys	
		Esc Exit

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
	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)* 

Z 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*)

CAP POS		www.capre	ail.com	Friday, I	May 6, 2016	Station 1						
Price	1 Check	Quantity	🗞 Item	0 Name			💥 Hot Keys	Open D	Dept Op	erations E	2 Exceptions Te	nder Remark
		Qty = 1		S-Ven Bill He	tures erring					CAP Soft	ware	
Cty 1 1	tem ID 8275 8276 8277		Description Front Brake Job Rear Brake Job Front End Alignme	nt	Price 58.3 70.0 91.6	Total - 3 58 33 0 70 00 7 91.67				POS CAP(seloware	9	
							\$1	\$5	\$10		TEST ITEN Value	1 No CHECK CASH
							\$20	\$50	\$100	Exact Change		LOTTOUT
							Cash	c	heck	Credit Ca	rd Gift Card	Gift Cert
3 Item	(s) 1	Printer Of	N	Sub Total		220.00	Debit		EBT	CC	> On Accoun	t
Sales HELL	Clerk			Тах		18.15						
				Total		238.15	Six Pack	Sing /	gle		Google	Help

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

CAP POS	www.capretail.c	om Friday, 1	Any 6, 2016	Station 1					
PriceC	heck Quantity	Name			XX Hot Keys	Open Dept	Operations Exe	teptions Tender	er Remark
	Qty = 1	S-Ven Bill He	tures rring			Configuratio	on Cale	) ndar Ca	<b>2</b> ancel
						Transaction	Money	Special	Output
Qty 1 1 1	Item ID 8275 8276 8277	Description Front Brake Job Rear Brake Job Front End Alignment	Price 1 58.33 70.00 91.67	Total 58.33 70.00 91.67		🚚 Ship To	Internal Use	Layaway	Cash Drawer Report
						Find Transaction	Paid Out	ayaway PullUp	Drawer Count
						Suspend	🚥 Dollar Amt.	Layaway Pay <u>m</u> ent	Quote
					Fir	nd Suspended	Gift Cert	EBT	Pick List
3 Item(s	5)			×	N	Nobile Import	Gift Card	ROA	Work Order
*	Printer ON	Sub Total		220.00	Sa	ave Recurring Invoice	Cash Check		Send files to Fintech
Sales ( HELLO	Clerk	Tax		18.15 238.15	s	Save Delivery	Cash Drop		

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*)

CAP POS		www.capret/	al.com	Friday, M	ay 6, 2016 1	Station 1							
l <mark>∵</mark> PriceCh	eck	Quantity	Item	0 Name				XX Hot Keys	Open Dept	<b>¢</b> Operations	1 Exceptions	Tender	<b>P</b> Remark
	c	Qty = 1		S-Vent Bill He	ures rring		-		Configurati	ion Money	a) Calendar S	Car	ncel Output
Qty   1   1   1   1	tem ID 8275 8276 8277		Description Front Brake Job Rear Brake Job Front End Alignme	nt S	Price 59.33	iotal	5.9.32	Clas	- Cauro		w Mode	way	Cash@rawer Report
					Manufacture Model:F150	er: Ford	Eun	Clea	3476			t PullUp	Drawer Count
					Style: Laria Miles:70,34	t 2					Ouch Pad Off	way ient	Quote
						) (						-	Pick List
3 Item(s)	)				Delete		Previou	IS Next	lobile import	Select E Gift Car	Esc Cancel	ROA	Work Order
<b>방</b> Sales Ci	lerk	Printer ON	4	Sub Total		220	.00	Sa	ive Redurring Invoice	Cash Che	ck		Send files to Fintech
HELLO				Total		238.	15	s	ave Delivery	Cash Dro	pp		

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

I <mark>™</mark> PriceC	heck Quantity	Name Name		Ramo - 1	<b>K</b> Hot Keys	Open Dept	¢ Operations	C Exceptions	Tender	<b>P</b> Remark
Manufa Model Style: Miles: <sup>Oty</sup>	Qty = 1 acturer: Ford F150 4X4 Lariat 70,342	Description	-Ventures ill Herring	Totai 🗕	Manufacturer: Ford Model:F150 4X4 Style: Lariat Miles:70,342 Details of work requi	red and Rear Turn Rotors, Ins	Accept Cancel			
1	8275 6277 6277	Front Brake Job Rear Brake Job Front End Alignment		58.33 56.33 70.00 70.00 91.67 91.67 91.67	Estimated Com bb Comp Comments from W	letion 5/8/2016 -	AN -			
3 Item(s 3 Sales ( HELLO	Printer ON	Sub To	otal Tax otal	220.00 18.15 238.15						

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.

IO0 Internatio	vare nal Plaza 76109.4844		WOR	KOR	DER
hone:			Store #1 - St	ation #1	
oll Free: (800)	826-5009		DATE:	05 05 0045	
			PAGE:	1	
Tax SOLD Bill He TO: S-Vent Dallas Phone	ID#.20100115 rring ures TX 76709 : (817) 249-1990		Manufacturer: Ford Model:F150 4X4 Style: Lariat Miles:70,342		
eplace pads stimated Con	Front and Rear. Turn pletion: 05/06/2016	Rotors, Inspect Front end as custo	mer states steering erad	ic.	
QTY	ITEM NUMBER	DESCRIPTI	DN	UNIT PRICE	TOTAL
1.		Front Brake Job		70.00	70.00
1.		Rear Brake Job		70.00	70.00
1.		Front End Alignment		91.67	91.67
3 Item(s)				Sub Total Tax 8.25% Total	231.67 19.12 250.78
Prepared by: H	4				
Suspended as	Herring111				

## 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)

CAP POS	warm.ca	pretal.com	Friday, M	lay 6, 2016 Statio	4						
PriceCh	eck Quantity	Solution (1997)	0 Name			X Hot Keys	Open Dept	<b>¢</b> Operations	Exceptions	Tender	<b>p</b> Remark
Manufar Model:F Style: L	Qty = 1 cturer: Ford 150 4X4 ariat		S-Vent Bill He	tures rring		Manufacturer: Ford Model:F150 4X4 Style: Lariat Miles:70,342		Accept			
Cty 1 1 1 1 1	tem ID 5275 5276 5276 5277 5278	Description Front Brake Job Rear Brake Job Front End Alignme Ford F150 Front R	int Rotor	Price Total 58.33 70.00 91.67 130.00	58 33 70.00 91 67 130.00	Front Rotors needed needs replaced.	setion 5/6/2016	shing AM ~			
						Comments from W     Picked Up	leted	Touch Pad Off	1		
4 Item(s)					_				-		
Sales C HELLO	Printer (	N	Sub Total Tax		350.00 28.88						
			Total	3	78.88						

## 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*)

CAP POS	winver.ca	pretail.com	Friday, M	ay 6, 2016	Station 1	_					
PriceCl	heck Quantity	<b>N</b> Item	0 Name			<b>XX</b> Hot Keys	Open Dept	<b>¢</b> Operations	Exceptions	Tender	ø Remark
Manufa Model: Style: L	Qty = 1 acturer: Ford F150 4X4 Lariat		S-Vent Bill He	ures rring							
Qty 1 1 1	V 558 22 Rem ID 8275 8276 8277 8278	Description Front Brake Job Rear Brake Job Front End Alignmen Ford F150 Front Ro	t tor	Price 58 3 70 0 91 8 130 0	Total         •           3         568 33           0         70 00           7         91 67           0         130 00						
					Tendering sale Review/Edit/Print Work Order de	tails before Completing Sale? Yes No					
4 Item(s	s)										
-	Printer		Sub Total		350.00						
Sales C HELLO	Clerk		Тах		28.88						
			Total		378.88	Six Pack	Single /		G	oogle	Help

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

PriceCheck	Quantity	No. 10	0 Name	au ( 200	Tatue 1	K Hot Keys	Open Dept	<b>Operations</b>	D Exceptions	Tender	<b>p</b> Remark
Qty = 1         S-Ventures Bill Herring           Mnnufnaturer: Ford Model: F150 4M4 Style: Lorent         Sile				Manufacturer: For Model:F150 4X4 Style: Lariat Miles:70,342		Accept	]				
Cey         term D           1         8275           1         8276           1         6277           1         8276		Description Front Brake Job Rear Brake Job Front End Alignme Fond F150 Front R	rt Ootor	Price 55.33 70.00 91.67 150.00	Total - 5833 7030 9167 13000	Estimated Com Received repared 4 Estimated Com 2 Job Com Comments from V Life Pad Varianty 1 Picked Up	Jetion 5:16:2016 - 5:16:2016 - Setion 5:16:2016 - Setion 0:5:06:2015 10: Serker on completion on Alagrene	Internet Park			
4 Item(s) Sales Clerk HELLO	Printer Of	v	Sub Total Tax Total		350.00 28.88 378.88						

- 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)

Find Transactio	n									
Number	0000412	Da	05/06/2016	Time 10:35 AM						
Sales	н	Stat	ion 1						View	$\sim$
Sold to:	2491990	S-Ver	tures		-				WorkOrder	
Remarks	_				_					Cancel
_						Transaction				
Q	by		0076	Item ID	Description		Price	Total	£0.00	Void
1.0	0		8276	8276	Rear Brake Job			0.00	70.00	
1.0	00		8277	8277	Front End Alignment			1.67	91.67	4
1.0	0		8278	8278	Ford F150 Front Rotor		13	0.00	130.00	€
										Return
										-
										Print
										Email
										Gift Receipt
										<b>6</b>
										6
_	_				1					
Fin								Sub Total	350.00	Packing List
								Tax	28.88	-0-0
1 - A	· ·	<	>				1004	Total	378.88	
		7	8				1234	Check	378.88	
Transa	ction									Ship To
0										0
· · ·		<pre></pre>								~
Dat		3	0							
										Bernarka
- ×		<	>							nemarks
		1	2							
Custo	mer									
								Discount	0.00	

## **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.

