



## **QuickStart Guide**

**Custom Views of Work In Process**

October 2004

## Custom Views of Work In Process

ARKONA QuickStart Guide

*Use this QuickStart Guide to learn how a service writer can customize their view of the Open Repair Orders List screen.*

- This feature lets a service writer customize their work in process screen as follows:
  1. Decide how your work in process is sorted on the screen.
  2. Exclude repair orders from other service writers.
  3. Include only repair orders in the statuses you want to see.
- Each service writer can customize their own view and the system saves the settings for each service writer.
- **To reset the view to the default**, follow the steps below and select all service writers and all statuses.

### 1. Get to the Open Repair Orders List screen.

- a. Take option **1=Repair orders** from the Service Department menu.
- b. Key in your service writer password and press [FIELD EXIT] to display the Open Repair Orders List screen.

### 2. Select the service writer you want to include.

- a. Use function **F4=Select** while your cursor is on the Position To field in the upper right area of the screen to display the selection window.
- b. Take option **1=Select** by Select By: Service Writer to display the Service Writer Selection window.
- c. Use [FIELD EXIT] to clear the '1' off of All Service Writers and take option **1=Select** by a service writer ID.
  - You may include more than 1 service writer or all service writers.
  - You may have to page down to see additional service writers.
- d. Press [ENTER] to save.
  - Note that your change is indicated on the Selected line of the Open Repair Orders List screen:

SD1000DB		Repair Order Entry		6/23/04	
QENSIGN				05:27:33	
=====		Selected		R0#/372/ALL	
ARKONA SUPPORT		Position to R0#		=====	
S					
—	Appt-SD	SHANK, JOEL		6/22	4:00PM SW: 372
—	Appt-SD	HUANG, SONG		6/23	3:00PM SW: 372
—	Appt-SD	BROCKWAY, JANICE		6/24	7:00 SW: 372
—	Appt-SD	RUDIS, ANDREW J		6/26	9:00 SW: 372
—	Appt-SD	FOSBRE, BILL		7/10	8:00 SW: 372
—	Apt-1Y	LONGWELL, DAVID		9/02	7:00 SW: 372
—	Apt-1Y	RAGSDALE, YICKIE		9/11	8:00 SW: 372
—	Apt-1Y	BARTOLO, REYNALDO		9/16	7:00 SW: 372
—	Apt-1Y	DECKER		9/17	7:00 SW: 372
—	Apt-1Y	CAMPOS, ARNOLD		9/18	8:00 SW: 372
—	Apt-1Y	MARTIN, KENNETH C		9/19	8:00 SW: 372
—	Apt-1Y	GANO, ESTELITA L		9/20	7:00 SW: 372
—	Pre-Inv	6013756 ALBERDING, DAMNA & F	372		(W) .00
—	Pre-Inv	6013783 LEUNG, KAM	372		(W) .00
—	Pre-Inv	6014325 STOLL, GREG	372		(W) .00
—	Pre-Inv	6014331 LEE, CORNELIUS	372		(S) .00
					More...
F3=Exit F4=Select F5=Refresh F6=Appointments F10=Messages F18=Listing					

### Open Repair Order List Screen

### 3. Select the statuses you want to include.

- Use function **F4=Select** while your cursor is on the Position To field in the upper right area of the screen.
- Take option **1=Select** by Select By: Status to display the Status Selection window.
- Clear the 1 off of All and take option **1=Select** by the statuses you want to include.
  - You may include more than 1 status or all statuses.
- Press [ENTER] to save.
  - Note that your change is indicated on the Selected line of the Open Repair Orders List screen:

SD1000DB		Repair Order Entry		6/23/04		
QENSIGN				05:31:23		
=====		=====		=====		
ARKONA SUPPORT		Selected		RO#/372/Cashier		
S		Position to		RO#		
=====		=====		=====		
—	Cashier	6016732	MCDONALD, RENEE	372	(P)	.00
—	Cashier	6017338	PINKSTAFF, ROXANNE	372	(W)	.00
—	Cashier	6017617	BENNETT, GEORGE	372	(W)	.00
—	Cashier	6017651	CALL, DEBORAH	372	(W)	.00
—	Cashier	6018058	DEBNEKOFF, PAM/DAVID	372	(W)	.00
—	Cashier	6018079	BROWN, LORA	372	(W)	.00
—	Cashier	6018170	LUTTER, PIERCE	372	(W)	.00
—	Cashier	6018185	DARBY, TOM	372	(W)	.00

Bottom

F3=Exit F4=Select F5=Refresh F6=Appointments F10=Messages F18=Listing

Only repair orders in the selected status are displayed.

The status selected is displayed here. The word 'LIST' displays if more than one status is selected.

#### Open Repair Order List Screen.

#### 4. Select how you want to sort the list.

- a. Hit F4 while your cursor is on the Position To field in the upper right area of the screen.
- b. Take option **1=Select** by any one of the Sort By criteria: RO Number, Name, Service Writer, Time Promised, Status, Time Remaining, or Tag Number.
  - It is recommended that you sort by name because you can:
    1. Position to the name of a customer on an open repair order.
    2. Retrieve an open or close repair order by repair order number
    3. Retrieve and open repair order by key tag number.
  - Once you have selected a sort criterion it is indicated on the Selected Line of the Open Repair Orders List screen.
  - You can use the Position To line to find open repair orders by whatever sort criterion you have selected.