



# INSTRUCTION MANUAL

## PART 3: WORK ORDERS

SAFE

Professional Septic, LLC Judy Pearson [- EXIT -](#)

SAFE SOFTWARE  
Version 11.1 Copyright 2011

Customers Work Orders Financials Reminders Organizing Summaries

Overview -----

Septic Contracts Septic Inspections Pumping Rentals Remote Alarms Vehicles Spreadsheets

Memos and Notes  
Date: 06/29/2011  
View or Add New  
Print All Print Range  
Delete Range of Memos

Utilities and Options  
Master Files  
Connect to a Network  
Backup Data  
Employees  
Switch Users (Login)  
Switch Names

Quick Search  
Site Address: [?] ?  
Last Name: [?] ?  
Email To: [?] ?  
Map: [?] ?

Customer Listings Customer Quickviews Miscellaneous Reports  
Company Listings Customer Counts Customers to Contact

Customers by Name	Count / City Name	Count / Subdivision	Count / County Name
A+ Plumbing,	158 Flower Mound	3 Hills of Argyle	589 Denton
Absolute Septic Pumping,	107 Argyle	3 Guy James Ranch	43 Cooke
ACE School of Tomorrow,	102 Double Oak	1 Wichita Creek Estates	4 Wise
ACE School of Tomorrow,	72 Sanger	1 Sunrise Bay	4 Tarrant
Adkins, Chris	47 Justin	1 Lake Kiowa	4 Grayson
Ahrweiler, Mary & Joerg	34 Copper Canyon	1 Hidden Falls Ranch	
Alford, Mark	33 Bartonville	1 Hidden Falls Ranch	
Allegro, Robert	32 Valley View	1 Hickory Hill Estates	
Alvarado, Diana	27 Krum	1 The Oaks	
Alvarez, JoEllen	23 Lewisville		
Amen, Darrell	19 Aubrey		
American Pet Spa,	17 Gainesville		

Total Customers Entered: 833 Total Cities in Master Files: 38 Subs in Master Files: 3 Total Counties in Master Files: 6



# Work Orders: CUSTOMER MENU



W.O.

### NEW Work Order

WO#     Opened on 03/16/2011    Entered on 03/16/2011    **Save / Exit**

<b>Customer Information</b>	Choose Customer: <input type="text"/>	<b>Contact Information</b>
ID: 484    Permit: <input type="text"/>		Home: (972) 691-7771    Ext: <input type="text"/>
Name: Young, Addie & Arjay		Cell: <input type="text"/>
Address: 5105 Wildwood Drive		Email: Young@email.com <input type="text"/>
City: Flower Mound		Area: FM    Flower Mound
State TX    Zip 75028 <input type="button" value="Google Map"/> <input type="button" value="Yahoo! Map"/>		MapKey: 626C    Stop: <input type="text"/>
<b>Additional Information</b>	<b>Important Dates</b>	<b>Times</b>
Lot: <input type="text"/> Block: <input type="text"/> <input type="checkbox"/> Commercial Customer	Opened: 03/16/2011    9:08 AM	Scheduled: 03/17/2011    9:08 AM
Sub: <input type="text"/>	Serviced: <input type="text"/>	Closed: <input type="text"/>
Brand: Cajun Air		Contract Ends: 05/29/2010
Tech: James R. "JR" Mackey		
<b>Details</b> <input type="button" value="Instructions to Technician"/> <input type="button" value="Mailing Address"/> <input type="button" value="Invoice Information"/>		
Entered By: Justin Harris    Work Order Type: Customer Request		
Problem: Problem with Pump		
Results: <input type="text"/>		

Record: 1 of 1        Search

# Work Order Creation – From the Customer Screen

SAFE Customers

Alerts Status: Active Contract Inspection Late

ID No: 1 626C Entered on: 11/13/2003

Prefix: Mr. Commercial Problem Do Not Service

First: Mark

Last: Alford

St. No: 4001 Rothschild Dr.

City: Flower Mound TX 75022

Current Balance: \$0.00

Open Invoices: \$675.00

Find By Name: Find By ID No: By Street Name

Customer Types: All Payments: \$675.00

Customer Information: [X] Mailing is the same as Site Address

Mailing Address: 4001 Rothschild Dr. Flower Mound TX 75022

Phone Numbers: Home: (972) 874-7800

Important Dates: Contract Start: 01/26/2011 Contract Ends: 01/26/2012

Work: Work Ext: Cell: Alt: Fax:

Documents: Notes: New Invoice: Open Invoices: All Invoices: All Prints: Proposals: Maps: GPS Info

Work Orders

One way to create a work order is by going to the customer and finding their record then clicking on the Work Order button and creating a new work order.

Work Orders for this Customer

Customer Work Order(s) Jon Denney  
123 Smith Rd  
Maypearl TX 76064

Send Email to: jmssoft@aol.com

Choose Option:  by Date Opened  by Date Scheduled  by Date Served  by Date Closed

Select Date Range: From: 04/01/2010 To: 04/30/2010

Choose your Report: One per Page Printout Work Order History - Listing

Options: New Work Order Show All Work Orders for Customer

Opened	WO#	Scheduled	Inclusive	Closed	Issue	Results	Tech
05/15/2010	1287	05/17/2010	05/17/2010	05/18/2010	Another Sprinkler was damaged. Also check the filters on the System and replace if need be.	Fixed sprinkler and changed the filters.	
04/20/2010	1286	04/21/2010	04/21/2010	04/22/2010	Sprinkler Head broken	Fixed	

Record: 14 of 1 of 2

New

Print

List

NEW Work Order

WO# 20

Opened on: 03/16/2011 Entered on: 03/16/2011

Customer Information: Young, Addie & Arjay

Address: 5105 Wildwood Drive, Flower Mound, TX 75028

Phone: (972) 691-7771

Important Dates: Opened: 03/16/2011 9:08 AM Scheduled: 03/17/2011 9:08 AM

Problem: Problem with Pump

Results:

Save / Exit

Work Order

Customer: Young, Addie & Arjay

Address: 5105 Wildwood Drive, Flower Mound, TX 75028

Problem: Problem with Pump

Page: 14 of 1

Work Orders by Customer

With Data Opened Between: 03/01/08 and 03/31/08

WO#	WO#	WO#	WO#	WO#	WO#	WO#	WO#	WO#	WO#
1287	1286	1285	1284	1283	1282	1281	1280	1279	1278

Page: 14 of 1

Enter all the information about the work order call. Click on each tab to enter that particular information. If you click on "Show all Work Orders for Customer", you can scroll through each work order that has been created for this specific customer.

Scroll through the preview

# Work Orders: MAIN MENU



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Connect to a Network  
Backup Data  
Employees  
Switch Users (Login)  
Switch Names

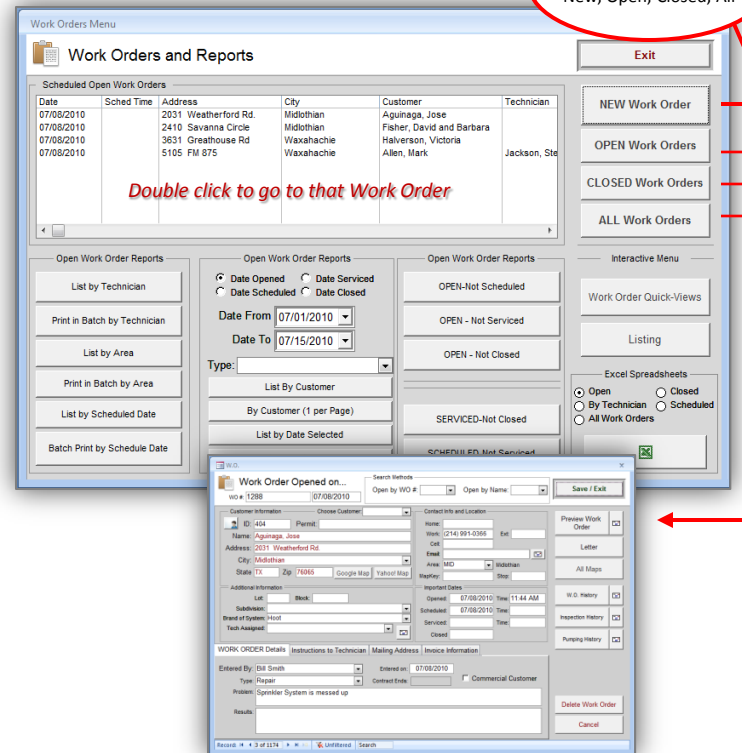
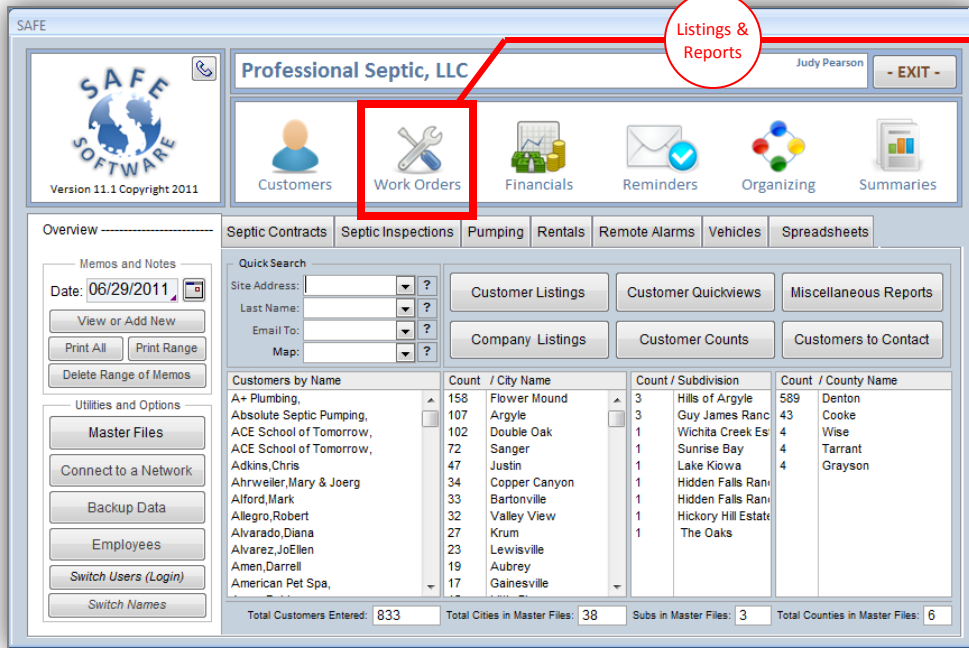
Quick Search  
Site Address: ?  
Last Name: ?  
Email To: ?  
Map: ?

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# Work Order Creation: From the Main Menu



## **WORK ORDERS:**

This screen will be used to create and track Work Orders. This section will be mainly used by companies that take many service calls a day. The printed work orders are not to be sent to regulatory authorities for their documentation. That should be taken care of by going to **Customers/Service/New Inspections**.

The Work Order is auto-numbered and you will be able to find it at any time by this number, the Customer's last name, or by any of the ways in "Other Search Methods".

Enter in all Work Order info if they are new or find them from the list of your customer base.

Enter pertinent data such as date opened, time opened, the actual service data, and date closed. ***If the date closed is NOT entered, they will remain on the Open Work Orders Listing in the Reports Menu.***

You can enter initial service call information for the service tech. If they are a current customer, you can create an invoice for the service call. If they aren't a customer, you should go to **Customers** and enter them as a new customer then go to **Service/Work Order** and then create the new WO from there.

Comments about the call can be entered in the "Reasons for Service as well as the "Service Performed" section. Instructions to the Technician will automatically appear if information has been entered in the Service/Instructions to the Technician section.

# MAIN MENU: Work Order REPORTS

There are several reports that you can bring up concerning your Work Orders.

Enter the appropriate DATE Range and then click on your desired report. Choose from many different criteria:

- Date Opened
- Date Scheduled
- Date Served
- Date Closed

Reports & Listings

Listings to Print

WO Quick Views  
Interactive Listings  
Print Preview WO

Excel Transfers



T H E E N D