

# Enabling Repair Orders and Setting Repair Preferences

Last Modified on 04/07/2026 11:39 am EDT

## Overview

There are 2 types of Repair Order, Internal & External.

- **Internal**
  - Repair
    - Taking broken item in my inventory and repairing it to keep it in stock.
- **External**
  - Return & Repair for Customer
    - Customer sends in a broken unit, you fix it and return it to the Customer
  - Return & Repair for Stock
    - Customer sends in a broken unit, you fix it and return the Repaired Item to Stock
  - Return & Replace
    - Customer sends in a broken unit and you Replace the Item, sending them a Replacement immediately after inspecting the unit.

[Learn More about Internal Repair Orders](#)

[Learn More About External Repair Orders](#)

## Enabling Repair Orders

Admin > Company Preferences

### Company Preferences

Section	Repairs
General	<input type="checkbox"/> <b>Disable Repair Orders</b>
Activities	<input checked="" type="checkbox"/> For customer repair orders, allow adding a lot or serial no if not contained in the list. <b>(Optional)</b>
Doc #s	<input checked="" type="checkbox"/> Roll up component prices to sales order.
Items	<input checked="" type="checkbox"/> Allocate components when a repair order is created or when a component is added.
Inventory	<input checked="" type="checkbox"/> Scan lot or serial number while creating a Repair Order
Sales	Default Repair Bin: <input type="text"/>
Shipping	Default Account: <input type="text"/>
Payments	
Purchasing	
Receiving	
Production	
Lot / Serial #s	
<b>Repair Orders</b>	
Rentals	
Mobile	
Mail and Calendar Integration	

- Head to **Admin > Company Preferences > Repair Orders**
- **Uncheck** the **Disable Repair Orders** preference
- In order to add a lot or serial number for repair orders, check the option called "For customer repair orders, allow adding a lot or serial no if not contained in the list." **(Optional)**
- Roll up component Prices to Sales Order (automatically set price on SO line based on components prices)
- Allocate Components when a Repair Order is created or when a component is added
- Scan lot or serial number when creating a Repair Order (not only allows user to scan in serial number instead of typing but can find associated item also if not allowing duplicate lot/serial numbers)
- Select the Default Repair Bin **(Optional)**
- Click **Save**

## Creating and Editing the Repair Item Group

The Repair Item Group is VERY similar to Service Items that you use in the system already. Components are used like a Bill of Materials that makes up the Repair Item. So you have your components, you repair the item similar to a Work Order, and you end off with an Item.

- Head to **Admin > Profile Lists > Item Group**
- Hit the **plus sign** on the left to create a new Item Group
- Set a **Name & Short Name**
- Make sure the Item Type is **Repair**
- Set the Default Accounts: **Income Account, Expense Account**
- Make sure Repair Items are either **Sold, Used, or Purchased** depending on your business

## Setting up the Doc Statuses for your Repair Orders

Similar to Doc Statuses for other types of documents, you can customize the statuses you use for Repair Orders.

Name	Type	Active	Actions
New	Processing	true	
Waiting for Approval	Payment Pending / Not Ap...	true	
Approved	Approved	true	
Received	Received	true	
Void	Voided or Not Processed	true	
Closed	Closed	true	

- Head to Admin > Doc Status > Repair Order
- Change the Names as you see fit if you'd like to customize
- Types used for Repair Orders include:
  - Processing
  - Payment Pending / Not Approved
  - Approved
  - Received
  - Voided or Not Processed
  - Closed

# Use a Sales Order Custom Field for Sales Order Type

**Important:** We recommend that you create a Sales Order Custom Field to delineate whether the Sales Order is for a Sale or a Repair. This is for External Repair Orders. External Repair orders are always started with a Sales Order that you add a Repair Item to which begins the whole Repair Order process. You can use this Custom Field to identify Repair Sales Orders on the Sales Order List and to filter them out on Reports.

The screenshot shows the OrderTime Admin interface. The top navigation bar includes Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports. The main content area is titled 'Admin > Custom Fields' and features a table of custom fields for 'Sales Order'. A modal window titled 'Custom Field Editor' is open, showing the configuration for a new custom field. The 'Caption' is 'Sales Order Type', 'Required' is checked, and 'Type' is 'Pick List'. The 'List Values' section contains a table with 'Name' and 'Delete' columns, listing 'Repair' and 'Sale' with red 'X' icons in the delete column.

FIELD	CAPTION	TYPE	REQUIRED	CALCULATED	DELETE
SOCust1	Test Cust Field	Memo	false	false	○
SOCust2	DD this	Yes/No	false	false	○
SOCust3	Part No	Text	false	false	○
SOCust4	Project	Date	false	false	○
SOCust5					○
SOCust6					○
SOCust7					○
SOCust8					○
SOCust9					○
SOCust10					○
SOCust11					○
SOCust12					○
SOCust13					○
SOCust14					○
SOCust15					○

Name	Delete
Repair	X
Sale	X

- Head to **Admin > Custom Fields**
- Select **Sales Order**
- Click **Add Custom Field** in the top-right
- Caption it as **Sales Order Type**
- You might want to make this a **Required** custom field
- Choose the **Type: Pick List**
- Make a Value for **Repair** and a Value for **Sale**
- Click **Save**

Admin > Page Layouts > Page Layout

**Edit Details Page for Sales Order** Revert to Default Save Cancel

Properties Widgets

Account #

Additional Fee

Additional Fee Rate

Additional Fee Sales Tax

Allocation Percent

Allocation Status

Allow Ship Partial

Assigned To

Balance

Bill Address Alt: Contact

Bill Address Alt: Phone

Bill Address Care of

Bill Address City

Bill Address Contact

Bill Address Country

Bill Address Email

Bill Address Fax

Bill Address Floor/Suite

Bill Address Name/Company

Bill Address Phone

Bill Address Record Info

Bill Address Sales Rep

Bill Address State/Prov./Reg.

Bill Address Street

Bill Address Website

General

No. Sample No.

Customer: Sample Customer

Date 10/18/2021

Promise Date 10/18/2021

Customer PO Sample Customer PO

Contact Sample Contact

Bill Address

WIDGETS INC.

4525 MAIN ST, SUITE 101

MIAMI, FL 33312

US

Total Margin 100.00

Total Margin Percentage

Ship Address

WIDGETS INC.

4525 MAIN ST, SUITE 101

MIAMI, FL 33312

US

Summary

Subtotal 0.00

Ship Amount 0.00

Discount -0.00

Additional Fee 0.00

Taxes 0.00

Total Amount 0.00

Paid Amount -0.00

Balance 0.00

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

Test Cust Field Sample Test: Cust Field

DO this

Part No Sample Part No

Project 10/18/2021

Sales Order Type Sample Sales Order Type

Ship Zone: Sample Ship Zone:

Budget 100.00

CM Sample CM

Ship by Date 10/18/2021

Order Lead Time Sample Order Lead Time

Contact Function Sample Contact Function

< 10.00

REP SN Sample REP SN

- Head to **Admin > Page Layouts**
- Click on the **Sales Order - Details Page**
- Drag **Sales Order Type** to the **Custom** Tab
- Click **Save**

oer time

All Orders Demo Sandbox Logout

Home Sales Purchasing Production Repairs Warehouse Reports

Admin > Page Layouts > Page Layout

**Edit Editor Page for Sales Order** Revert to Default Save Cancel

Properties Widgets

Allow Ship Partial

Bill Address Alt: Contact

Bill Address Alt: Phone

Bill Address Care of

Bill Address City

Bill Address Contact

Bill Address Copy changes to customer

Bill Address Country

Bill Address Email

Bill Address Fax

Bill Address Floor/Suite

Bill Address Name/Company

Bill Address Phone

Bill Address Sales Rep

Bill Address State/Prov./Reg.

Bill Address Street

Bill Address Website

Bill Address Zip/Postal code

Budget

c

Class

CM

Contact

Contact Function

Currency

Customer: ABC Customer Ltd

No. Sample No.

Date 10/18/2021

Promise Date 10/18/2021

Customer PO Sample Customer PO

Address Defaults Memo & Instructions Custom

Sales Order Type

Test Cust Field Sample Test: Cust Field

DO this

Part No Sample Part No

Project 10/18/2021

Ship Zone: Sample Ship Zone:

Budget 100.00

CM Sample CM

Ship by Date 10/18/2021

Order Lead Time Sample Order Lead Time

Contact Function Sample Contact Function

< 10.00

REP SN Sample REP SN

- Head to **Admin > Page Layouts**
- Click on the **Sales Order - Editor Page**
- Drag **Sales Order Type** to the **Custom** Tab
- Click **Save**

## Editing the Profile Lists — Repair Order Type, Problem Codes & Warranty Type

Under the Profile Lists you can customize the Repair Names you want to have in the system and their corresponding Repair Type.

The screenshot shows the 'Repair Order Type' configuration page in the OrderTime system. On the left, there is a sidebar with 'Active Status' (Active, Inactive, Both), 'Records' (+), and a list of records: 'Internal Stock', 'Repair', 'Return & Repair For Customer', 'Return & Repair For Stock', and 'Return & Replace'. The 'Internal Stock' record is selected. On the right, the form for editing this record is shown. The 'Name' field contains 'Internal Stock'. The 'Repair Type' dropdown menu is open, showing options: 'Repair', 'Return & Repair For Customer', 'Return & Repair For Stock', and 'Return & Replace'. The 'Repair' option is selected. The 'Is default' checkbox is checked, and the 'Active' checkbox is also checked.

- Head to **Admin > Profile Lists > Repair Order Type**
- Create new records by clicking the **Plus Sign** to the right of the word Records
- You can edit the **Repair Name**
- Choose the **Repair Type**:
  - Repair
  - Return & Repair for Customer
  - Return & Repair For Stock
  - Return & Replace
- Make your custom type the default with **Is default** or make certain types **Active** or **Inactive**
- Click **Save**

## Warranty Types

The screenshot shows the 'Warranty Type' configuration page in the OrderTime system. On the left, there is a sidebar with 'Active Status' (Active, Inactive, Both), 'Records' (+), and a list of records: '3 Year Warranty' and 'New Customer - 1 Year'. The 'New Customer - 1 Year' record is selected. On the right, the form for editing this record is shown. The 'Name' field contains 'New Customer - 1 Year'. The 'Description' field contains 'When the customer first purchases, they can have a default 1 year warranty. This covers parts and labor for approved repairs.' The 'Default length of warranty in days' field contains '365'. The 'Active' checkbox is checked.

- Head to **Admin > Profile Lists > Warranty Type**
- Create New Warranty Types by clicking the **Plus Sign** to the right of Records
- You can set the **Warranty Name**
- Include a **Description** of what the warranty covers
- Set a **Default Length of Warranty in Days** (eg. 1 Year = 365)

- Set the Warranty to **Active**
- Click **Save**

## Problem Codes

Problem Codes are used to track recurring things that can happen to an Item that needs to be repaired. Multiple problem codes can be applied to a Repair Order. You can make up and completely customize your Problem Codes.

- Head to **Admin > Profile Lists > Problem Code**
- Add a new Problem Code by clicking the **Plus Sign** to the right of Records
- You can set the **Problem Code Name**
- Write a **Description** for what causes the Problem Code or how to identify the problem
- Set the Problem Code to **Active**
- Click **Save**

## Add the In Repair column to the Inventory List

This column shows the quantity of that Item that are currently in Repair. This is very helpful to get an at-a-glance look at the stock that is being repaired.

OrderTime All Orders Demo Sandbox Logout

Home Sales Purchasing Production **Repairs** Warehouse Reports

Warehouse > Inventory

Create New Open Full List

Recent Records

- Repair 1
- 111
- 1689
- 1692
- 2
- 1
- Follow up
- 1600
- 705 Solutions Inc

Inventory

Batch Action Item Search Inventory

ITEM	DESCRIPTION	LOCATION	BIN	LOT / SERIAL NUMBER	AVAILABLE	UOM	EXPIRATION DATE	IN REPAIR	ALLOCATED
<input type="checkbox"/>	BOT001	HQ	Floor		3,224.00	EA	10/18/2021	0.00	612.00
<input type="checkbox"/>	Test Liquid	HQ	Floor		779.00	oz	10/18/2021	0.00	300.00
<input type="checkbox"/>	100	HQ	A-1-P	612102	-1.00	EA	11/20/2020	0.00	220.00
<input type="checkbox"/>	101	HQ	Floor	836419	0.00	EA	2/21/2019	0.00	203.50
<input type="checkbox"/>	105	HQ	Floor	323048	883.50	EA	10/25/2020	0.00	158.00
<input type="checkbox"/>	109						10/18/2021	0.00	153.35
<input type="checkbox"/>	111						10/18/2021	0.00	124.00
<input type="checkbox"/>	BOX001						10/18/2021	0.00	76.10
<input type="checkbox"/>	110						10/18/2021	0.00	68.00
<input type="checkbox"/>	Therapeutic Skin Cream						3/30/2018	0.00	60.00
<input type="checkbox"/>	106						10/18/2021	0.00	56.00
<input type="checkbox"/>	100						4/23/2021	0.00	49.00
<input type="checkbox"/>	112						10/18/2021	0.00	30.00
<input type="checkbox"/>	104						10/18/2021	0.00	23.86
<input type="checkbox"/>	0932409-Y						8/6/2019	0.00	22.00
<input type="checkbox"/>	A100001						2/21/2019	0.00	20.00
<input type="checkbox"/>	111						10/18/2021	0.00	20.00
<input type="checkbox"/>	107						10/18/2021	0.00	18.00
<input type="checkbox"/>	111						10/18/2021	0.00	14.00
<input type="checkbox"/>	101						3/21/2019	0.00	12.00

List Options

Filters Columns **Other**

Available columns

- Active
- Available
- Available and Unavailable
- Bob
- Booked
- Cal 3
- Cal 1
- Cal 2
- Cal 4
- Cal 5

Selected columns

- Item
- Description
- Location
- Bin
- Loc / Serial Number
- Available
- UOM
- Expiration Date
- In Repair**
- Allocated

Save Cancel Reset

Powered by NumberCruncher Terms of Use Privacy

- Head to **Open Full List > Inventory**
- Click the **cog** in the top-right of the list
- Click on the **Columns** Tab
- Select the **In Repair** column and click **Add**
- Click **Save**