

# Enabling Repair Orders and Setting Repair Preferences

Last Modified on 11/04/2021 9:39 am EDT

## Overview

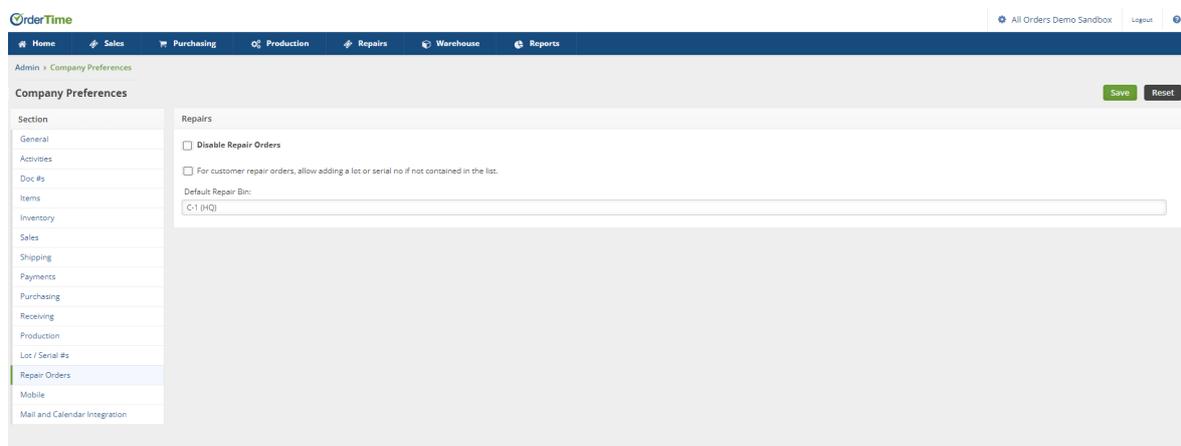
There are 2 types of Repair Order, Internal & External.

- **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



- 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)**
- 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.

The screenshot shows the OrderTime Admin interface. The top navigation bar includes Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports. The breadcrumb trail is Admin > Profile Lists > Item Group. The main content area is titled 'Item Group' and contains a 'Repair Items Group' form. On the left, there is a sidebar with 'Active Status' (Active, Inactive, Both) and a list of records with a plus sign icon. The form fields include: Name (Repair Item Group), Short Name (RPI), Item Type (Repair), Is default (checked), Active (checked), Default Accounts (Income Account: Sales [Income], Expense Account: Insurance - Disability [Expense]), UOM Set (EA-CASE 12), Is Sold (checked), Is Used (unchecked), Is Purchased (unchecked), and Item Cost Type (Sum of Bill of Materials). There are Save and Reset buttons at the top right of the form.

- 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.

FIELD	CAPTION	TYPE	REQUIRED	CALCULATED	DELETE
SOCust1	Test Cust Field	Memo	false	false	<input type="radio"/>
SOCust2	DO this	Yes/No	false	false	<input type="radio"/>
SOCust3	Part No	Text	false	false	<input type="radio"/>
SOCust4	Project	Date	false	false	<input type="radio"/>
SOCust5					<input type="radio"/>
SOCust6					<input type="radio"/>
SOCust7					<input type="radio"/>
SOCust8					<input type="radio"/>
SOCust9					<input type="radio"/>
SOCust10					<input type="radio"/>
SOCust11					<input type="radio"/>
SOCust12					<input type="radio"/>
SOCust13					<input type="radio"/>
SOCust14					<input type="radio"/>
SOCust15					<input type="radio"/>

Name	Delete
Repair	<input checked="" type="checkbox"/>
Sale	<input checked="" type="checkbox"/>

- 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**

The screenshot shows the 'Edit Details Page for Sales Order' interface. The 'Custom' tab is selected, displaying a 'Sales Order Type' field with a dropdown menu. The dropdown is open, showing options like 'Repair' and 'Sale'. Other fields visible include 'Text Cust Field' with a text input, 'Part No', 'Project', 'Ship Zone', 'Budget', 'CM', 'Ship by Date', 'Order Lead Time', 'Contact Function', and 'REP SN'.

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

The screenshot shows the 'Edit Editor Page for Sales Order' interface. The 'Custom' tab is selected, displaying a 'Sales Order Type' field with a dropdown menu. The dropdown is open, showing options like 'Repair' and 'Sale'. Other fields visible include 'Text Cust Field' with a text input, 'Part No', 'Project', 'Ship Zone', 'Budget', 'CM', 'Ship by Date', 'Order Lead Time', 'Contact Function', and '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. The page includes a navigation menu at the top with options like Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports. The main content area is titled 'Repair Order Type' and features a sidebar on the left with 'Active Status' (radio buttons for Active, Inactive, Both), a 'Records' list with a plus sign, and a table of records: 'Internal Stock', 'Repair', 'Return & Repair For Customer', 'Return & Repair For Stock', and 'Return & Replace'. At the bottom of the sidebar, it says 'Total Records: 5'. On the right, there is a form for editing a record. The 'Name' field is 'Internal Stock'. The 'Repair Type' dropdown is set to 'Repair'. The 'Is default' dropdown is set to 'Internal Stock'. The 'Active' dropdown is set to 'Repair'.

- 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

Home Sales Purchasing Production Repairs Warehouse Reports

Admin > Profile Lists > Warranty Type

### Warranty Type

Active Status  
 Active  Inactive  Both

Records  
 3 Year Warranty  
 New Customer - 1 Year

Total Records: 2

New Customer - 1 Year

Name: New Customer - 1 Year

Description: When the customer first purchases, they can have a default 1 year warranty. This covers parts and labor for approved repairs.

Default length of warranty in days: 365

Active

- 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.

Home Sales Purchasing Production Repairs Warehouse Reports

Admin > Profile Lists > Problem Code

### Problem Code

Active Status  
 Active  Inactive  Both

Records  
 LED Out  
 Motor Out of Service  
 Track Broken  
 Track Missing

Total Records: 4

LED Out

Name: LED Out

Description: This occurs when the LED flashes twice.

Active

- 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.

The screenshot shows the OrderTime Warehouse Inventory page. The 'List Options' dialog box is open, showing the 'Columns' tab. The 'Available columns' list includes 'In Repair', which is highlighted. The 'Selected columns' list includes 'Item', 'Description', 'Location', 'Bin', 'Lot / Serial Number', 'Available', 'UOM', 'Expiration Date', 'In Repair', and 'Allocated'. The 'In Repair' column is currently empty in the main table.

ITEM	DESCRIPTION	LOCATION	BIN	LOT / SERIAL NUMBER	AVAILABLE	UOM	EXPIRATION DATE	IN REPAIR	ALLOCATED
BOT001		HQ	Floor		3,224.00	EA	10/18/2021	0.00	612.00
Test Liquid		HQ	Floor		779.00	oz	10/18/2021	0.00	300.00
100	Sushi Men Moulds no plus	HQ	A-1-P	612102	-1.00	EA	11/20/2020	0.00	220.00
101	1/4" Trays	HQ	Floor	836419	0.00	EA	2/21/2019	0.00	203.50
105	Parts	HQ	Floor	323048	883.50	EA	10/25/2020	0.00	158.00
109							10/18/2021	0.00	153.35
111							10/18/2021	0.00	124.00
BOX001							10/18/2021	0.00	76.10
110							10/18/2021	0.00	68.00
Therapeutic Skin Creams							3/30/2018	0.00	60.00
106							10/18/2021	0.00	56.00
100							4/23/2021	0.00	49.00
112							10/18/2021	0.00	30.00
104							10/18/2021	0.00	23.86
0932409-Y							8/6/2019	0.00	22.00
A100001							2/21/2019	0.00	20.00
111							10/18/2021	0.00	20.00
107							10/18/2021	0.00	18.00
111							10/18/2021	0.00	14.00
101							3/21/2019	0.00	12.00

- 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**