

Creating an External Repair Order

Last Modified on 05/09/2022 9:25 am EDT

Overview

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

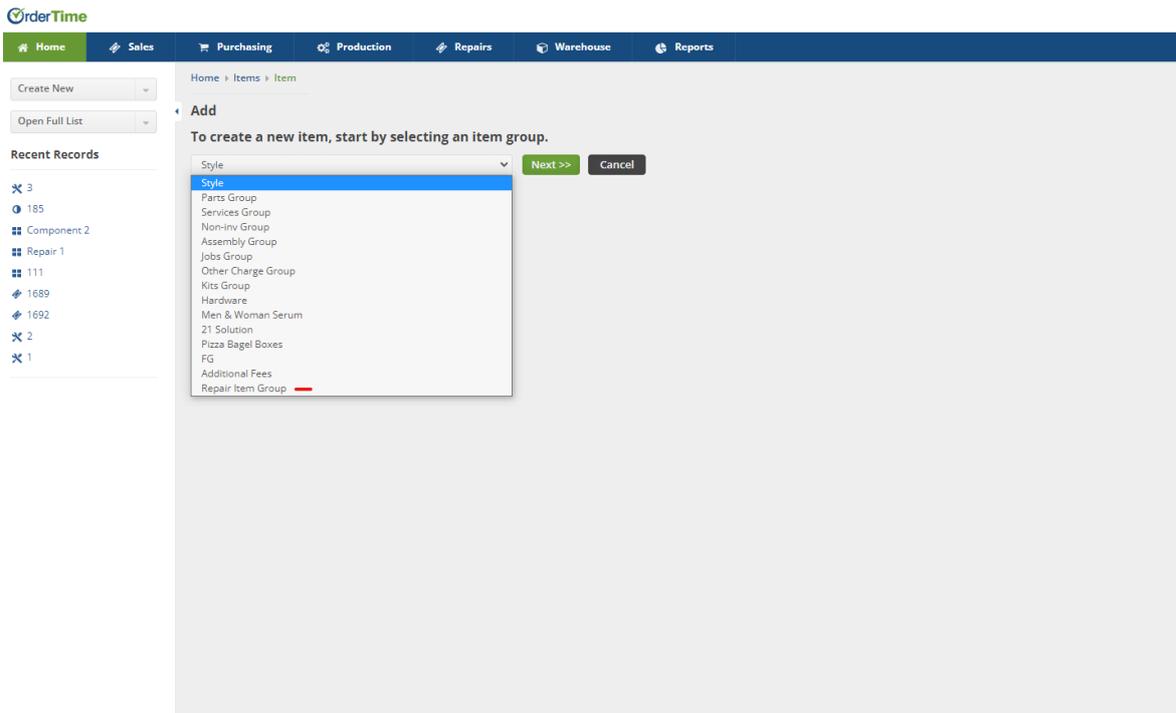
- **Internal**
 - Repair
 - Taking broken item in my inventory and repairing it to keep it in stock.
- **External**
 - Return & Repair for Customer
 - Customer sends in a broken unit, you fix it and return it to the Customer
 - Return & Repair for Stock
 - Customer sends in a broken unit, you fix it 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.

[Enabling Repair Orders and Setting Repair Preferences](#)

[Learn More About Internal Repair Orders](#)

First Create Your Repair Item

You want to start off by creating your Repair Item. The Repair Item can be used just like a Service Item in Order Time. In this example I'm going to call it Warranty Repair.



- Head to the **Create New** drop-down
- Click on **Item**
- Choose the **Repair Item Group** from the Item drop-down and click **Next**
- Make sure to change the **Name**, I changed it to Warranty Repair, left out the price, and selected the Expense Accounts & Income Accounts.
- Then click **Save**

Next Add the Column for Sales Order Type to your List

As long as you followed the instructions here, [Enabling Repair Orders and Setting Repair Preferences](#), you should have a custom field called Sales Order Type. We want to add that to the Sales Order List so that we can distinguish regular Sales Orders from Sales Orders with an attached Repair.

The screenshot displays the OrderTime software interface. At the top, there is a navigation bar with tabs for Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports. Below this, the 'Sales + Sales Orders' section is visible. A 'List Options' dialog box is open, showing the 'Columns' tab. The dialog box has three tabs: 'Filters', 'Columns', and 'Other'. The 'Columns' tab is active, showing a list of available columns on the left and a list of selected columns on the right. The 'Sales Order Type' column is highlighted in the selected columns list. The background shows a table of sales orders with columns for NO., CUSTOMER, DATE, PROMISE DATE, CUSTOMER PO, TOTAL AMOUNT, STATUS, FILL STATUS, ORDER SOURCE, SALES ORDER TYPE, SHIP BY DATE, ALLOCATION STATUS, ALLOCATION PERCENT, and ACTIONS.

- Click on the **Open Full List** drop-down and select **Sales Orders**
- Click on the cog in the top-right of the list and select the **Columns** tab
- Add the **Sales Order Type** custom field, order it how you like and click **Save**

Create an External Repair Order

Your External Repair Orders will always begin with a Sales Order. You create a Sales Order, add the Repair Item, enter the Repair Order Wizard, finish off the Repair Order and fill out a Ship Doc to ship the item back if necessary.

- Click on **Create New** and choose **Sales Order**
 - Optionally click on **Open Full List, Sales Orders**, and click on **Create New Sales Order** in the top-right
- Begin your **Sales Order** like normal, select your Customer that you're doing the repair for and fill out all the necessary info
- Make sure to click the **Custom** tab and change the **Sales Order Type** to **Repair**.
 - This allows you to filter your **Sales Order List** by **Sales** or **Repairs**
 - It also helps for filtering in your **Reports**
- Once your **Sales Order** is created you will add the **Repair Item** to the list on the **Sales Order**

- Doing so will jump you into the **Repair Wizard**
- It is identical to the first screen when creating an **Internal Repair Order**
- Select the **Quantity, Price, Tax Code**
- Select the **Type**:
 - **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
 - Would you like the Cost on this Repair Order to be Capitalized? Yes = Value adjustment and close Repair Order -- No = Close Repair and no Value adjustment
 - **Return & Replace**
 - Customer sends in a broken unit and you Replace the Item, sending them a Replacement immediately after inspecting the unit.
- Choose the **Item & Serial or Lot Number**
- Choose the **Location** and **Bin** and the **Employee** handling the repair
- Then click **Save**

IMAGE	LINE NO.	ITEM	DESCRIPTION	AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO.	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
	1	Repair 1	No.: 2 Name: Hard Drive Lot / Serial Number: 52375027096KLFKJH Description	0.00	1.00	1.00	EA	50.00	50.00	○			0.00	1.00	🔍 ⚙️
	2	Warranty Repair	No.: 4 Name: Hard Drive Lot / Serial Number: 630497690347690 Description	0.00	1.00	1.00	EA	0.00	0.00	○			0.00	1.00	🔍 ⚙️

- Once the **Repair Item** has been added you can see that in the **Description** there is some information:
 - The Repair No
 - Name of the Item being Repaired
 - Lot / Serial of the Item
 - Description of the Item

- Click on the number displayed to enter the **Repair Order** itself
- Once you enter the **Repair Order**, you will notice that it is stuck in **Waiting for Approval**
 - **External Repair Orders cannot be Approved until the base Sales Order has been Approved**

Repairs > Repair Orders > Repair Order Created By Ian Benoit 10/19/2021 1:19 AM Modified By Ian Benoit 10/19/2021 1:23 AM

Repair Order - 4 From Sales Order 1692 EDIT ALLOCATE Create PDF Export Status: Approved

General	Repairs	Dates
No. 4 Item: Hard Drive Location: HQ Bin: C-1 Lot / Serial Number: 630497690347690	Type: Return & Repair For Customer Warranty Warranty Expires	Date: 10/19/2021 Est. Completion Date: 10/19/2021 Received Date Return Date

Components | Descriptions and Notes | Custom | Problem Codes | Repair History | Linked Documents | Movement History | Attachments | Open Activities | Activity History

Name/Number Search Item Scan

ITEM	DESCRIPTION	ESTIMATED QUANTITY	STD. COST	QUANTITY	UOM	VALUE AMOUNT	ACTIONS

- Add **Components** that are necessary for the repair, very similar to a Work Order
 - The Estimated Quantity is what you think you'll need, when you click the Allocate button it will Allocate all
 - The Quantity column is the true amount that was used.
 - You can enter a Std. Cost and a Value Amount
- Click on the **Problem Codes** column
 - Add Problem Codes to show the recurring issues that are happening to the Item
- **Repair History**, Linked Documents, Movement History, Attachments, Open Activities, Activity History
 - All these columns are similar to Work Orders and other Documents
- Click on **Allocate** and set the Status to **Approved**
- Set the **Repair Order** to the status of **Closed** when finished

Sales > Sales Orders > Sale Order Created By Ian Benoit 10/12/2021 2:31 PM Modified By Ian Benoit 10/19/2021 1:23 AM

Sales Order - 1692 ALLOCATE DEALLOCATE Create PDF Export Print Label Status: Approved

General	Bill Address	Ship Address	Summary Revision: 1
No. 1692 Customer: 1496 Ontario Inc. Change Date: 10/12/2021 Promise Date: 10/22/2021 Customer PO: REPO0005 Contact	1496 ONTARIO INC. 123 YONGE ST SUITE 300B TORONTO, ON M4V 3T5 CA Total Margin: -123.40 Total Margin Percentage: -246.800%	1496 ONTARIO INC. 4651 SEHRIDAN ST SUITE 300B TORONTO, TX M4V 3T5 CA	Subtotal: 50.00 LIPS: 5.00Tax Discount: -0.00 Additional Fee: 0.00 FL-Broward (0 %): 0.00 Total Amount: 55.00 Paid Amount: -0.00 Balance: 55.00

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

IMAGE	LINE NO.	ITEM	DESCRIPTION	AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
1	Repair 1	No.: 2 Name: Hard Drive Lot / Serial Number: 52375027096KLPJH Description		0.00	1.00	1.00	EA	50.00	50.00	<input type="checkbox"/>			1.00	0.00	<input type="checkbox"/>
2	Warranty Repair	No.: 4 Name: Hard Drive Lot / Serial Number: 630497690347690 Description		0.00	1.00	0.00	EA	0.00	0.00	<input checked="" type="checkbox"/>			1.00	0.00	<input type="checkbox"/>

- Head back to the **Sales Order** and **Allocate**
 - **Make sure that the Cleared column shows a checkmark for each Repair Item. You want to have both of them finished with Components that are in stock for the Repair**
- Now you can move on to **closing the Sales Order** which will create a new **Ship Doc**
- The **Ship Doc** shows the description of the **Repair Item** and what is being sent back to the **Customer**
- From there you will be ready to return the **Repaired Item** to the **Customer** following your

regular **Ship Doc** procedures.