Creating an External Repair Order

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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.

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- 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 clickSave

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**

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- 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

No. : 4 Name : Hard Drive Lot / Serial Number : 630497690347690

• 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	By Ian Benoliel 10/19/2021 1:19 AM Modified By Ian Benoliel 10/19/2021 1:23 A						
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ITEM DESCRIPTION	ESTIMATED QUANTITY	STD. COST	QUANTITY U	MOL		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

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- 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.