

Report for Promised Dates on Work Orders

From the Main Menu:

#1 Sales Menu

#1 Sales, Invoices, Work Orders

Take Option F17 – View Open Work Orders

Take Option F9 – Open Work Order Reports

Take Option 3 – Optioned Open Summary Report

```
South Point Systems Inc.                                Program: W00026
                                                         Time---: 14:41:10
                                                         Date---: 5/13/02
                                                         User---: SARAH

Open Work Order Report Options
Option Option Description
1. Print Open Work Order Summary Report
2. Work Order Part Number Back Order Detail Report
3. Optioned Open Summary Report
4. Re-Print Open Work Orders with Back Orders
5. Cancel This Report Request

Enter a Valid Option to Continue-----: _

F7 - EXIT PROGRAM
```

Then, go to middle of page to select “Print only records with Promised Dates that fall on/after: 000000”

Enter dates.... Or, chose the “Print only records with Promised Dates that fall on/before:000000”

Screen looks as follows:

```
South Point Systems Inc.                                Program: W00026
                                                         Time---: 18:52:23
                                                         Date---: 9/11/02
                                                         User---: SARAH

OPEN WORK ORDER or ESTIMATE/QUOTES SUMMARY REPORT OPTIONS

Your summary report may be limited by the following restrictions.
If you do not want to enter restrictions then leave the field(s) blank.
Your report will be based on the WORK ORDER file.
Enter Y to print only records with unfinished labor-----:
Enter B, L, P or Y to print only records with this ready/hold code----:
B = Waiting for Labor to be finished AND parts arrival.
L = Waiting for Labor to be finished only.
P = Waiting for Parts arrival only.
Y = Ready for Invoicing with Labor Finished and Parts that have arrived.
Print only records with Promised Dates that fall on or after----: 0/00/00 MDY
Print only records with Promised Dates that fall on or before---: 0/00/00 MDY
To use the Promise Date fields you must enter dates in both fields.
For example on or after date of 08/26/94 and on or before date of 08/30/94
would restrict your report to records with Promised dates between those
dates. You must enter BOTH dates to restrict. Slashes may be ommitted.
Enter Salesperson if you wish to restrict report only to that Salesperson:
PRESS ENTER TO CONTINUE (+)
F7 - EXIT PROGRAM WITHOUT PRODUCING REPORT
```

This should produce the report you want to determine Promised Dates.

How do we know that we are to call customer – how does the sales team now? See the following screen:

Account	Amount	Status	Tax Code	Surcharge	Descriptions
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SHIP TO INFORMATION		BILL TO INFORMATION	
80000 016		80000	
SOUTH POINT SYSTEMS		SOUTH POINT SYSTEMS	
1019 HIGHWAY 431 NORTH		1019 HIGHWAY 431 NORTH	
P.O. BOX 855		P.O. BOX 855	
BOAZ AL 35957-1710		BOAZ AL 35957-1710	

Type of Trans--:	C CHARGE	Total List--:	Parts Shipped:
Call When Rdy--:	Y	Total Parts:	Labor Shipped:
Promise Mth/Dy:	09/30	Total Labor:	Backorders---
Promisd Year--:	2002	Net Cores--:	No Parts or Labor
Dating Bgn Mth:		Total Tax--:	Cannot Invoice Now
Dating Nbr Pmt:		Additions--:	Total Records:
Freight Chrges:		Grand Total:	Total Weight--: .00
		Reduction--:	

ENTER TO CONTINUE	F3 - VIEW HELP	F8 - PAGE BACK
F2 - REVIEW	F4 - END PROCESSING	F15 - DISPLAY CUSTOMERS BY NAME

As you can see there is a space provided in the Sales/Work Order Creation to Call When Ready: Y for Yes, Blank equals No. This is where you put your Promise Date as well.

To get to this screen: After you have entered the parts and have taken an F9 to end entry, you are taken to the Screen that denotes payment information, message line, etc... There is an Option F8 to Page Forward. That is the screen above. **However, it is up to you to organize the manner in which call will be placed, and to stay on top of this. There is not automatic report generated that will alert you that you are xxxx number of hours away from this promised date on xxxx number or work orders.**

Work in Progress with Promised Dates printout/report? You can use the same report option (#3) as selecting Promised Dates to review. "Enter B, L, P, or Y to print only records with this ready/hold code:" should narrow your search criteria.

```
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F7 - EXIT PROGRAM WITHOUT PRODUCING REPORT
```

If additional assistance is required, email support@southpoint.net or call our office.