HHG – Creating Outbound Work Orders





HHG Process – Creating Outbound Work Orders

• Creating the Outbound Work Order

- Click on the Customer icon on the Dashboard. The customer List screen will appear displaying all customers.
- From the Customer Listing screen double click on the Customer to open the Customer Detail screen.

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• Click on the Work Orders tab to open the work orders for this specific customer.

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• From the Work Orders tab all available work orders will be displayed. In this case there is only an Inbound Work Order because the outbound work order has not yet been created.

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- From the Customer Work Order screen click the New Button.
- Notice that the type is set to Outbound by default.

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- If using the Windfall Mobile Pro Application Download to Scanner must be checked for the Outbound Work Order to sync.
- Any additional information can be added at this time.
- For Interstate Orders the Original Registration number field will need to changed. Make sure to select the Original Interstate Registration number from the list before saving.

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Add items to the Work Order

- Click the Add New icon.
- Select either:
 - By Inventory Number: List all inventory items for the selected customer
 - By Location: List all the locations in which the inventory is for the selected customer
- When finished selecting click the Add button to add the items to the Outbound Work Order.
- The added items will now be displayed in the line item section of the Work Order.
- Save the work order by clicking the save button.
- Once the outbound work order has been completed click the Submit Button to move the work order to a submitted status.

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