

# MANAGING WORK ORDERS -SHIPPING STAFF GUIDE

updated 030723 matt

[Link / loop to zoho article](#)

## WHY?

We do this so we don't miss any issues that needs action.

Sales staff will use the work order manager so they can view their orders as they are process thru the different production departments

Sales staff can view and assist with any delays and communicate these to the customer if required

## WHEN?

This task should be done 3 times per day to ensure work orders are done correctly by sales staff

-----

## SETUP

The key is setting up pinnacle unconfirmed work order views -sort from most recent and view on full screen

-----

## STEPS -

### THINGS TO CHECK

- Accounts payment notification is correct - CHK accounts ,COD accounts
- Courier and date of shipping are correct
- Check if there's any staff name in the Assigned User

## BROKERED PARTS

Brokered parts are the ones with B status

Once it arrives at JJ it will be assigned to dispatchwhite (THIS MEANS THE PART IS HERE ON SITE)

## RESOLUTION

If you see the column for resolution turned to red, SALES don't need to action -

C/B - This only means that the part is now in courier bay.

PICKUP - This only means that the part is now in PICKUP bay. You may call customer to advise it is ready for collection.

TNT - This only means that the part is now in TNT bay.

PEDRO - This only means that its already picked from shelves and ready for dispatch and staff have put the part in Sam Pedro bay.

ON RECO BENCH - This means the part was put in that area to have the part ready for reco process.

AUS POST - This only means that the part is now in AUSPOST bay.

## THE ONES SALES NEED TO ACTION -

- Only sales need to action when they receive a message from either shipping or operations
- Chat received from DISPATCH STAFF

i.e -

"WO#1234567 has damages, images added please update work order and advise customer & if ok to send?"

- Chat received from OPERATIONS - IE

"WO# 128500 has damages, images added and put into ready to invoice"

WHEN SALES ACTION YOU MUST ADD COMMENT ON WORK ORDER

"Spoke to Bob SMSd images and confirmed ok to send with damages \$100 discount applied"

- This order will now also have a RED RESOLUTIONS COMMENT
- If ok to send clear resolution with name date and time (BRAD 06/10 - 10am OK TO SEND)
- SALES team will then need to remove from ready to invoice if it is ok to send
- Then reply back to the person whom chatted you regarding the issue

=====

## FAQs

### What does it mean when the work order is highlighted in purple/red OVERDUE?

- This means that the dispatch time/schedule for that work order has already passed, could be multiply reasons as to why it wasn't sent. - SALES **DON'T** NEED TO ADVISE CUSTOMER UNLESS SHIPPING TELL THEM THAT MISSED CARRIER
- IF SALES need to update customer IE - Advise them it will go the next day or what the status is of the part - add to order history notes (spoke to Bob advised part will be sent tomorrow date)
- IF brokered chase up supplier on an ETA of the part - add to order history notes in PO - then update customer as per above.

	W			1234179	guest	C27164	EASTCC2	(JJ) 2016 XV WHEEL ALLOY	16/11/20 @ 1:44 PM	eBay User:petes_3...	PICK PARTS/IDESP	Open
	W	16/11/20 @ 1:00 PM	MAIL- Take to the mail box to Post	1234187	luke	C27817	1FVZ3	(JJ) 2006 NAVARA RIGHT FRONT WINDOW REGN	16/11/20 @ 1:52 PM	CASH ACC LUKE - ...	PICK PARTS/IDESP	Open
R	W	16/11/20 @ 2:01 PM	2E BLUESTAR - For engine/trans - 3PM (W 2P...	1233477	GlennA	C25726	YDUE1	(JJ) 2010 XTRAIL ENGINE	13/11/20 @ 2:16 PM	CASH ACC ALEX - ...	PICK PARTS/IDESP	Open
R	W	16/11/20 @ 2:01 PM	2E BLUESTAR - For engine/trans - 3PM (W 2P...	1233530	guest	C27739	ROOFCB1	(JJ) 2007 TARAGO TOWBAR	13/11/20 @ 1:24 PM	Damian Kuczynski - ...	PICK PARTS/IDESP	Open

**What if the status says completed but the WO is still highlighted in purple (overdue)?**

- It only means the order has been done but just not completed off the work order status. You can just leave or ignore this as it will be removed from the list soon by shipping staff

**What to do if I need to update the work order and there is already an assignee (ie dispatchblue) in work order manager?**

- When there is a name already in the assigned User column this means that person is already working on the order. So if we make a change to that work order we would need to advise that person via Pinnacle chat.

**What to do if there are other notes that I don't know what to do?**

Salesperson don't need to worry about the note in red in resolution.

Those are just little notes between dismantlers and dispatch so they would know quickly the status of it.

They only thing that salesperson need to action are the ones noted in the guide above.

For the sample screenshot below sales person only need to worry about is the last note that says "PICKUP"

R		Y	05/03/21 @ 2:00 PM	6C.PICK UP 2PM AFTER LUNCH (W
	ALIMAD	D	05/03/21 @ 2:00 PM	6C.PICK UP 2PM AFTER LUNCH (W
	HIRA 04/03 ARE YOU ABLE TO GET DIAGRAM SO I CAN SHOW DISMANTLER EXACTLY WHATS NE			
	EDED			
R	HIRA 05/03 : W/O 1276518 WHRS THE LINK YOU SAID YOU HAD DONE			
R	LINK ADDED TO W			
	/O			
	HIRA 05/03 W/O 1276518 IMAGES ADDED TO PINNACLE ,			
	PUICK UP			
		W	05/03/21 @ 3:15 PM	7D.AXIOM-CANBERRA (W2.45. CUT C