



# UPDATE

ONE ANDREWS CIRCLE  
BRECKSVILLE, OHIO 44141  
1-800-807-2093

Volume 1 Issue 3

May 1996

## THE TEN COMMANDMENTS OF WORK ORDERS

Work orders not only allow you to invoice your customers for services rendered, but they assist you in maintaining control of boxes and files into and out of your warehouse. Listed below are some important tips in making sure all users are getting the most out of this software feature.

**1. New Boxes-Cross-reference To The Initial Work Order:** When bringing new boxes into the warehouse for the first time, the first step in maintaining their tracking is with the initial work order and subsequent data entry that will accompany them. A cross reference must be maintained between this initial work order and the transmittal sheet or batch number that will come in with the new boxes. The service codes utilized will be: 1) an applicable delivery/pickup charge, 2) media type(s) being brought in for storage (At this point, you will be required to enter the total number of days to bill for storage during the first partial month.), 3) box charge (Note: This charge could be less for The Mini Keeper users versus data that must be keyed in by record center personnel.), and 4) any over-the-box limit charges, etc. used by the local record center. On the work order, locate the section just above the blue-tinted area for special instructions and write in the batch/transmittal number(s), department numbers and total number of boxes and their media types **for each department**. The work order number, date, total number/media type of new boxes will be entered on the accompanying transmittal sheet (batch printout if using The Mini Keeper). This is most important since this is your only method of tracking boxes coming into the warehouse for the first time.

**2. Use Page Up (↑) and Page Down (↓) Keys to Move Between the Work Order Screens:** After entering the customer number, the system automatically assigns the next available work order number and you have now created a new work order. The first screen allows you to enter the date the order was received, date the delivery/pick up will occur, customer who called in the order and record center personnel taking the order and

preparing the order, as well as all necessary instructions to the driver for the pickup or delivery. The second screen will be used for entering all applicable service codes. You can move back and forth between these screens by using the "Page Up/Page Down" keys.

**3. Box Number Must be Keyed in for Box Retrieval:** When you enter a service code for the delivery of a box to a customer, you will be required to key in the bar-coded box number.

**4. Use Edit or Finish Option to Remove a Box Number from a Work Order:** You have entered a box for retrieval on a work order and the customer then calls and cancels the order. Go back into your work order (either under edit or finish) and key in the appropriate service code and then the box number you wish to remove. The system will ask if you want to remove this box number and you will answer yes. If the box has already been scanned out of the warehouse--you must make sure the box is scanned back into its correct media location.

**5. All File Retrievals Must Have an Assigned Bar Code Label:** Enter the appropriate service code; the next screen has spaces for the box number, the file bar code number and file description. If you know the file bar code number, this is the only information you will need to enter. If you do not know the file bar code number; enter the box number. If that box has any files that have already had any type of activity (in or out), they will be listed and your preference is made at this point. If not, the system will give you three options: Auto assign, Manual Assign and Quit. If you select auto assign, you must remember to print out new file bar code labels after all orders have been entered for that day. The manual assign selection is generally used for emergency orders and you will use a file bar code you have already printed out.