



# Technician Work Order Write-Up SOP

**Purpose:** Teach technician how to properly fill out service work order to ensure that our customer invoices are correct and that our inventories stay accurate.

## 1. WHEN and WHERE to fill out work order

Ultimately, following this best practice makes sure the work order is accurate and turned in on time.

- a. **WHEN:** You MUST request work order number before starting evaluation or repairs. All technicians must complete work orders at the end of each service repair visit. Technician should also update the timesheet for that particular repair time slot.
- b. **WHERE:** Do this while you are still at the customer since this time is part of the labor for the service repair visit. It also helps to document the work correctly while the work is still fresh in your mind.

## 2. Completing Top Section of Work Order

- a. Fill out accurate make/model/serial, hour meter (do not include decimals), date started and date complete, customer name and address (minimum street & city), unit # if applicable, contact and phone # and PO number if provided (please ask).

## 3. Completing Repair Write-Up Section of Work Order

The below listed sections need to be included on every repair. They are required for warranty claims and they help customers understand the work performed and hours involved which assists in collecting payment. Ensure that you follow this sequence in order:

- a. **Complaint:** What was the customer's complaint or reason for service call?
- b. **Cause:** What did you find that caused the problem? How do you think it happened?
- c. **Corrections:** What did you do to fix the problem?

**NOTE:** Make sure you order any parts needed BEFORE you leave the truck in case any additional info (or photos) are needed from the Parts Department. Examples include a mast number to order any mast parts, cylinder numbers for packing kits, tire sizes, et cetera.

## 4. Completing Parts Section of Work Order

These inputs are critical for KMH to manage our inventories and bill accurately.

- a. **Parts from Van** – write down quantity, part # and description and write Van # in VAN box.  
NOTE: KMH can provide list of commonly used part #s to make this easier
- b. **Parts from Parts Dept.** – write down quantity, part # and description and check Pt. Dpt. Box.  
NOTE: This includes both in-stock and ordered parts.
- c. **Parts from Local Vendor** – write down quantity, "PO # \_\_\_\_\_" in part number field and the description then write letter L in Pt. Dpt. Box.

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Southwest Ohio Dayton	Central Ohio Columbus	Southern Ohio Cincinnati	Northwest Ohio Toledo	Central Kentucky Lexington	Western Michigan Grand Rapids	Greater Chicago Elgin
Northern Indiana South Bend	Central Indiana Logansport	Northeast Indiana Fort Wayne	Northwest Indiana Schererville	Middle Tennessee Nashville	Eastern Tennessee Cookeville	Northern Georgia Atlanta



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- o **Local parts receipts must be photographed and emailed to your local parts rep the same day as the purchase** (before the work order is handed in). In the email subject line, include either the work order or PO and tech's name. Submit hard copy according to local branch instructions.

- d. **Parts from Consignment** – write down quantity, part # and description and write letter C in Pt. Dpt. Box.
- e. **Parts that Customer Supplies** – write down quantity, “customer part” in part # field and description. Write letter C in Pt. Dpt. Box.

## 5. Completing Bottom Section of Work Order

- a. **Service Vehicle #** – Write your service vehicle number
- b. **Mechanic's Signature** – Sign your name
- c. **Customer Signature** – You **MUST** have customer sign upon arrival as this explicitly gives KMH the authority to evaluate and repair (and later) invoice the customer.
- d. **Printed Name** – This is for the customer to print their name; this helps with record keeping in the event of any questions that arise

## 6. Submit Completed Work Order

- a. **LOCAL TECH** (close to branch) – turn into designated location inside branch
- b. **REMOTE TECH** (far from branch) – photo of work orders should be emailed to the customer's servicing branch using the following convention: BRANCHNAME then WORKORDERS@KMHSYSTEMS.COM; that's plural with an S (ie [chicagoworkorders@kmhsystems.com](mailto:chicagoworkorders@kmhsystems.com); [nashvilleworkorders@kmhsystems.com](mailto:nashvilleworkorders@kmhsystems.com); [grandrapidsworkorders@kmhsystems.com](mailto:grandrapidsworkorders@kmhsystems.com))

See below example work order with all sections properly filled out:

I read, understand and agree to adhere to this policy:

Printed Name: \_\_\_\_\_

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Equipment & Service Solutions

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Equipment & Service Solutions



SERVICE REC. NO.

## WORK ORDER

# 213369

NAME FLEXAUST	UNIT # 215-2	DATE STARTED 9-17-15	DATE COMPLETE 9-17-15
ADDRESS 10825 7th St WARSAW, IN	CONTACT MIKE VOSS	RO. NO. 10021	
	MAKE YALE	HOUR METER 2091	PHONE # 260-555-3247
	MODEL GLC040RGNUAE084		
	SERIAL NUMBER E187V09920W		

QTY	PART NO.	DESCRIPTION	Y A R	EST COST	COMPLAINT
1	5059705-72	KIT, LOCK OFF	733		NO START
1	5187966-23	KIT, REGULATOR	733		
1	B1008	BIZ CARB CLEANER	733		
					CAUSE: DROVE TO CUSTOMER'S LOCATION. CHECKED FORKLIFT AND FOUND ENGINE WOULD CRANK BUT WOULD NOT START. ENGINE HAD SPARK AND WOULD START ON CARB CLEANER. THERE IS A PROBLEM WITH FUEL SYSTEM.

CORRECTION: REBUILT FUEL SYSTEM, FORKLIFT STARTED AND RAN OKAY.

CUSTOMER     INTERNAL  
 GM             REVIEW FOR WARRANTY

SERVICE VEHICLE # 733

I hereby authorize the above repair work along with the necessary material, and hereby grant you and/or your employees permission to operate the hoist or truck herein described for the purpose of testing and/or inspection. An express mechanic's lien is hereby acknowledged on above hoist or truck to secure the amount of repairs thereto.

CUSTOMER SIGNATURE X Mike Voss      DATE 9-17-15

MECHANIC'S SIGNATURE Evan Ross      PRINTED NAME MIKE VOSS  
 PHONE NUMBER 260-555-3247

- Dayton, OH 937-890-0711    North Chicago 847-795-8080    Fort Wayne, IN 260-493-4411    North Nashville 877-634-8833
- Cincinnati, OH 513-469-9400    South Chicago 219-313-0426    South Bend, IN 574-288-0655    South Nashville 615-793-8100
- Columbus, OH 614-843-0205    Grand Rapids, MI 616-222-0612    Logansport, IN 574-753-0451    Lexington, KY 859-308-0237